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UNIVERSITY OF ALBERTA

THE GENESIS AND EARLY GROWTH OF THE ALBERTA  
HUMAN RESOURCES RESEARCH COUNCIL

by



ALBERT ALLAN CLEVELAND

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES  
IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE  
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UNIVERSITY OF ALBERTA  
FACULTY OF GRADUATE STUDIES

The undersigned certify that they have read, and  
recommend to the Faculty of Graduate Studies for acceptance,  
a thesis entitled "The Genesis and Early Growth of the Alberta  
Human Resources Research Council" submitted by Albert Allan  
Cleveland in partial fulfilment of the requirements for the  
degree of Master of Education.





## ABSTRACT

The major purpose of this study was to describe the genesis and early growth of an organization. The organization studied was the Alberta Human Resources Research Council. The study described the events leading to the conception of the idea of H.R.R.C.; the enactment of the legislation; the development of the initial policies; and the modification of these policies. Data were collected by examining available records and by interviewing a number of individuals who undertook activity on behalf of H.R.R.C.

Results of the analysis of data revealed that the idea for H.R.R.C. grew out of the activities of a number of education-interest organizations in Alberta and the Government of Alberta. The part played by the education-interest organizations was one of requesting Government financial support of educational research. The Government's interest in a human resources research agency grew out of a shift in policy emphasis in the early 1960's and the problems encountered in operationalizing the policy.

In November, 1966, Dr. T.C. Byrne and Mr. E. Schmidt, using the proposal which had been submitted by the education-interest organizations as a model, began writing H.R.R.C.'s legislation. The debate in the Legislature indicated that few Alberta legislators were opposed to H.R.R.C. and that they envisioned that educational research would receive considerable attention in H.R.R.C.'s program of research. On March 30, 1967, the legislation to establish H.R.R.C.





received Royal Assent.

The passage of the Act was followed by a nine-month delay in operationalizing H.R.R.C. In January and June, 1968, the Council met and took decisions which had implications for H.R.R.C. policy. These decisions indicated that H.R.R.C. was to be primarily an in-house research agency; remain responsive to Government research needs; and inform social policy. The Council also took decisions regarding the financial compensations for H.R.R.C. staff.

On September 3, 1968, the staff met for the first time and began to plan a program of research. During the planning period the staff took over the function of policy development from the Council. On January 16, 1969, the Council approved, almost entirely, the proposals submitted by the staff.

The major policy modification was that of allowing H.R.R.C. to fund the research efforts of independent researchers. Attention was given by the staff to the issues of: (1) H.R.R.C.'s relationships with Government and other external agencies, (2) finances, and (3) organizational structure. These issues, however, remain unresolved.



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Finally, the author expresses his thanks to his wife for her constant support and encouragement.





## CHRONOLOGY OF MAJOR EVENTS

Date	Event
November 7, 1966	The Government announces that legislative approval of H.R.R.C. will be sought.
March 30, 1967	Legislation establishing H.R.R.C. is given Royal Assent.
October 17, 1967	The Government appoints seven Albertans to the Council of H.R.R.C.
December 18, 1967	Dr. L.W. Downey accepts the position of Director of H.R.R.C.
January 12, 1968	The first meeting of Council is held.
June 10, 1968	The second meeting of Council is held. Policy decisions are made and approval given to a number of feasibility studies.
September 3, 1968	The staff of H.R.R.C. gathers for the first time and embark upon a Five Phase Planning Process.
December 5, 1968	E.C. Manning, Premier of Alberta, and a major advocate of human resources development retires.
January 16, 1969	The third meeting of Council is held. Approval given to a program of research.





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## CHAPTER I

### INTRODUCTION AND PROBLEM

#### I. INTRODUCTION

Organizations permeate our society! Whether they be large or small, formal or informal, organizations inevitably guide, shape, and evaluate an individual's working, playing, and learning activities. Even in death, Etzioni contends, organizations maintain a grasp on the individual. "Most of us will die in an organization, and when the time comes for burial, the largest organization of all -- the state -- must grant official permission." (4:1)

#### II. THE PROBLEM

##### Statement of the Problem

This study was an investigation of the genesis and early growth of an organization. Specifically, the organization studied was the Human Resources Research Council of Alberta (H.R.R.C.).

##### Sub-Problems

In order to conduct the study four major areas were identified:

1. The idea:

- a. What antecedent movements, such as commissions and committees were instrumental in the conception and propagation of the idea of H.R.R.C.?
- b. Who were the people instrumental in the conception and propagation of the idea of H.R.R.C.?
- c. What were the major factors responsible for these individuals becoming interested in the idea?



2. Political action:

- a. What individuals or organizations were instrumental in promoting legislative action concerning the creation of H.R.R.C.?
- b. What opposition was expressed, if any, to the creation of H.R.R.C.?
- c. What did those individuals in the legislature who proposed the legislation envisage for H.R.R.C.?
- d. What did the incorporating statute envisage for H.R.R.C.?

3. Initial policy development:

- a. What individuals or organizations were responsible for formulating the initial policies of H.R.R.C.?
- b. What influences were brought to bear on policy formulation?
- c. The following policy areas were examined:
  - (i) the objectives of H.R.R.C.,
  - (ii) the organizational structure,
  - (iii) finances, and
  - (iv) relationship to external agencies.

4. Policy modification:

- a. In what way have the policies of the organization been modified since the initial policy was developed?
- b. What individuals or organizations -- both internal and external to H.R.R.C. -- were responsible for the modifications of the initial policy?
- c. Why were the policies modified?





- d. What effect has the modification of policy had on  
H.R.R.C.?

### Importance of the Study

The student of organizations studies organizations in order to obtain an understanding of the manner in which people and materials are brought together to achieve some purpose. To this end, he pursues studies concerned with such organizational features as the purpose, the structural characteristics, the behavior of its members, and the efficiency of the organization. (7:256) However, a most important area in the study of organizations has often been overlooked or pursued with subdued vigor -- namely, the study of the creation and growth of organizations.

The study of the creation and growth of an organization may contribute to organizational theory in several ways. First, if one accepts Etzioni's assertion that, "Organizations are social units . . . deliberately constructed and reconstructed to seek specific goals." (4:3), then it is apparent that organizations develop in response to a need. Despite the great number of organizational theories that have been postulated, little is known of the conditions requisite to the creation of an organization.

Second, Haire suggests that the study of the genesis and growth of an organization leads to an understanding of the lawful processes in the forces creating organizations. (8:273)

Third, the study of organizations has tended to focus on organizations as they exist, at a particular point in time. If one accepts the premise that organizations are capable of growth, then, if a sound theory of organization is to be developed, there is a need to



secure knowledge of how organizations grow and why they grow. That is, there is little knowledge of the forces shaping organizations as they grow.

Fourth, Triandis maintains that for those working in organizations there is a need to be aware of the history of organizations for:

It is obvious that previous decisions relevant to organizational behavior have an influence on subsequent organizational behavior . . . Thus, the organizational history is one of the constraints on the design of a new organization. (14:60-64)

Fifth, during the past twenty years a number of descriptive studies of oil companies, (2, 5, 9, 10, 12, 16); insurance companies, (1,15); and manufacturing companies, (11), have been undertaken. These studies, however, have often attempted to describe events which occurred in earlier centuries. A study of H.R.R.C., on the other hand, provides an opportunity to study an organization in its nascent form.

In summary, to those who are concerned with organizations this study could serve to provide preliminary answers to questions such as, why and how are organizations created, and why and how do organizations grow?

### Definition of Terms

Formal structure. This term refers to the formal arrangement of functions into positions occupied by individuals in the organization. Positions can be described in terms of their place in a hierarchy and of the expectations regarding the tasks to be performed.





Informal structure. The definition of informal structure used in this study is that of Tannebaum, who defines informal structure as, " . . . the unplanned, informal set of groups, friendships, and attachments that inevitably develop when people are placed in regular proximity to one another." (13:1) For the purpose of this study regular proximity refers to the work situation H.R.R.C. staff members find themselves in during H.R.R.C. business hours and within the confines of H.R.R.C. headquarters.

Objectives. For the purpose of this study the term objectives refers to the ends or outcomes sought.

Organization. The definition of organization used in this study is that of Downs. Downs defines an organization as a, " . . . system of consciously coordinated activities . . . of two or more persons explicitly created to achieve specific ends." (3:24)

Policy. The term policy refers to characteristic practices of the members of the organization. These practices, which may or may not conform to written statements of policy, are reflected in the decisions and actions of the members of the organization.

#### Delimitation of the Study

This study will be restricted to those events of import to H.R.R.C. which occurred prior to January 16, 1969.

#### Limitations of the Study

The validity of the conclusions reached in this study will be subject to the following limitations:

1. The securing of appropriate records of events leading to



- the creation of H.R.R.C.
2. The securing of appropriate records of events subsequent to the establishment of H.R.R.C.
3. The trustworthiness and accuracy of the records that are examined.
4. The validity of opinions collected by the researcher.
5. The accuracy of the interpretations made of the data.

### Sources of Data

The sources of data for this study may be described in the following manner:

1. Legislative acts, such as constitutions, statutes, and charters.
2. Executive and other official records.
  - a. Proceedings of administrative officers and bodies, such as,
    - (i) minutes of meetings,
    - (ii) reports of officers, and
    - (iii) records.
  - b. Proceedings of deliberative bodies, such as the legislature.
  - c. Reports of commissions.
  - d. Catalogues, prospectuses, and advertisements.
3. Newspapers and periodicals.
4. Personal materials.
  - a. Autobiographies, memoirs.
  - b. Letters.



## 5. Interviews.

### Treatment of the Data

The data were arranged topically and chronologically. Each sub-problem was considered as a topic. Within each topic the data were arranged chronologically. Figure 1 is an illustration of the ordering of the data. In this setting, each of the questions posited in the sub-problems was discussed. The purpose of the discussion was to trace the means by which ideas were disseminated so as to discover the major factors impinging upon the decisions and actions undertaken on behalf of H.R.R.C.





FIGURE 1

A MODEL FOR THE TREATMENT OF DATA

CHRONOLOGICAL						
		Prior to January 1, 1967 to	March 30, 1967 to	January 12, 1968 to	August 31, 1968 to	January 16, 1969
T O P I C A L	The Idea	Written Data .....	.....	.....	.....	.....
	Political Action	Interview Data .....	.....	.....	.....	.....
	Initial Policy Development	.....	.....	.....	.....	.....
	Policy Modification	.....	.....	.....	.....	.....
		.....	.....	.....	.....	.....



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## CHAPTER II

### THE IDEA

#### I. INTRODUCTION

This chapter describes the events which lead to an idea -- an idea which was to lead to the establishment of the H.R.R.C. These events are subsumed into two categories: (1) attempts to establish a Government-supported educational research agency in Alberta and (2) activities aimed at establishing a human resources research agency in Alberta.

#### II. ATTEMPTS TO ESTABLISH A GOVERNMENT-SUPPORTED EDUCATIONAL RESEARCH AGENCY

##### The Alberta Advisory Committee on Educational Research

Although Alberta education had received the attention of researchers since the post-World War I period, the state of Alberta educational research in the mid-twentieth century could only be described as inadequate. The Faculty of Education, University of Alberta, noted that educational research within Alberta was prevented from playing a significant role in Alberta education during the years 1920 to 1950 because such research lacked financial support and coordination. (25:41)

By 1953, there was current among Alberta educators the belief that if educational research was to realize its potential, a base of financial support broader than that afforded by the University was required. In that year, representatives of the University of Alberta,



the Department of Education, the Alberta School Trustees' Association (A.S.T.A.), the Alberta Teachers' Association (A.T.A.), and the Alberta Federation of Home and School Associations (A.F.H.S.A.) met in Edmonton. The product of their discussions was the creation of the Alberta Advisory Committee on Educational Research (A.A.C.E.R.). (25:41-42)

Supported, in the main, by voluntary financial contributions from its membership, the A.A.C.E.R. adopted as its purpose the encouragement and financial assistance of educational research. (1) To this end, the A.A.C.E.R. funded research projects and, in 1955, commenced publication of The Alberta Journal of Educational Research.

An examination of the revenues and the sources of these revenues suggest that by 1960 the A.A.C.E.R. had achieved a position of great import in Alberta educational research. Revenues of \$4,744 in 1954 had multiplied six-fold by 1960. (2) Substantial financial support was being shown by the major educational organizations in Alberta. In addition, in 1956 the Carnegie Corporation of New York awarded \$50,000 to support the research endeavours of the A.A.C.E.R. over a five year period. (2)

With its stature seemingly assured, the A.A.C.E.R. set about the task of 'getting the job done.' So involved did it become with its task of initiating, financing, and publishing educational research, that the A.A.C.E.R. withdrew, until mid - 1965, from many of the activities aimed at establishing a Government-supported educational research agency.



### The Royal Commission on Education

The year 1958 saw a concerted effort, by many Alberta educational organizations, to convince the Government that there was an urgent need for educational research to receive support from the public treasury. The activities of the proponents of educational research evolved from the growing anxiety among the citizens of Alberta that Alberta's educational system was not meeting the needs of society. In an attempt to ameliorate the growing dissatisfaction with her educational system the Government of Alberta established the Royal Commission on Education on December 31, 1957. (42)

Educational research. Charged both with examining the current state of Alberta education and assessing the future needs of Alberta education, the Commission expended considerable effort in making an appraisal of educational research within the province. Their investigations and the many briefs which they had examined led the Commissioners to conclude that despite the establishment of the Faculty of Education in 1945 and the A.A.C.E.R. in 1953, educational research in Alberta was, " . . . still woefully restricted . . . " (49:278)

Having enunciated its concern as to the insignificant role played by educational research in Alberta education, the Commission recommended:

That immediate plans be made by the provincial government and the university to provide the space and equipment for the educational research organization . . . .

That the provincial government make provision for the necessary capital and operating grants on a basis similar to that now used for the Alberta Research Council, at the





earliest possible date . . . .

That the province provide the legislative authority to constitute on a formal basis a revised and re-constituted Alberta Committee on Educational Research. (49:282)

The Alberta Educational Planning Commission. Having posited its recommendations dealing with research, the majority of the Commission wrote:

. . . the Commission believes that there is a need for a kind of agency whose function it will be to study the broad needs of our changing society, not just from an educational standpoint but from that of assessing trends and changes in population, in industrial and economic development, and in social needs. (49:283)

Such a belief, the Commission acknowledged, arose from the convictions of individual Commission members and a memorandum from the Faculty of Education. After the Faculty had presented its formal brief it was asked by the Commission to identify the needs for educational research more explicitly. To this end a memorandum was written, primarily by Dr. H.T. Coutts, Dean of Faculty of Education and Dr. S.C.T. Clarke, Secretary of the Faculty Committee on Educational Research. The memorandum identified the specific needs for educational research as:

1. Research designed to study the general problems of society, of which education is one. Such research, because of its sociological and economic aspects, should be planned and executed by trained research workers in sociology, economics, or education, or by teams of workers from these fields.
2. Such research studies might be undertaken . . . on an ad hoc basis, and would be under the direction of well-trained research staff. Alternatively, studies might be conducted by a permanent educational research organization developed along lines of the Alberta Research Council. (49:279)



In order to give practical effect to their concept of a research agency whose scope extended beyond that of education the Commission recommended that the Government establish an Alberta Education Planning Commission (A.E.P.C.). (49:284)

Functions of the A.E.P.C. To the A.E.P.C. the majority report attributed such functions as:

1. To give full time to the careful assessment and anticipation of educational needs in the broadest sense of the term.
2. To study, evaluate, and report upon new ideas, methods, projects, and developments which would have a bearing on the provision of educational facilities, their geographic location, and their relationship to existing or potential institutions.
3. To study continuously and to assess the coordination of educational resources, and to make recommendations as to the agencies which should carry out the program. (49:284)

Structure of the A.E.P.C. The A.E.P.C. would consist of five members -- three full-time and two part-time. Of the full-time members, the Chairman would be an individual eminently qualified in education, science, or business. The other two full-time members were to be qualified in sociology, education, or economics. (49:285)

A divergent opinion. On November 9, 1959, the Royal Commission on Education submitted both a majority and a minority report to the Government of Alberta. To their dismay, the educators of Alberta learned that the minority report vehemently opposed the establishment of the A.E.P.C.

The minority report asserted:

With this section of the majority report I must emphatically emphasize my complete disagreement. It is not in any real sense a body advisory to the Minister of Education, or to any other



Minister, but in very truth a Planning Commission with immense powers, designed of its very nature to short-circuit the responsible Minister of the Crown. (49:444)

The A.E.P.C. is denied legislative approval. In addition to the minority report, failure of the A.E.P.C. to receive legislative sanction may also be attributed to the public debate generated by the two reports. Accreditation, merit pay for teachers and school finance quickly eclipsed any discussion of educational research and the A.E.P.C.

A member of the Royal Commission attributed the lack of legislative action on the recommendations dealing with educational research and the A.E.P.C. to:

1. The purpose of the Royal Commission had been to reduce public pressure on the Government -- this end had been accomplished.
2. The minority report may have crystallized political opposition.
3. There was a belief among various government members that educational research would not produce much of practical value. (41)

Support for the last contention of the Commission member is evidenced in an article which appeared in the March 22, 1961, edition of the Edmonton Journal. Entitled, "Hinman Says Lack of Results 'Best Thing' About Commission," the article quoted Alberta's Provincial Treasurer as saying:

. . . no field of endeavor today is so wasteful as educational research . . . it won't provide accurate answers like other fields of research because it deals with human beings and controls cannot be set up. (28)





The death knell for the A.E.P.C. was sounded on March 17, 1961, when the Minister of Education tabled a statement in the Alberta legislature, regarding the disposition of the recommendations of the Royal Commission. The statement identified twenty-five recommendations which had not been implemented and upon which no action was contemplated. Included in this category was the recommendation for the establishment of the A.E.P.C. The statement asserted, in part, that:

Senior officials of the Department in consultation with the University of Alberta and the school organizations of the province presently fulfill all the functions of the proposed Alberta Educational Planning Commission, consequently there is no real need for establishing such a body at substantial additional expense to the people of the province. (14:31)

Dormancy. With the demise of the proposed A.E.P.C. and the apparent intention of the Government not to take immediate action on the recommendations respecting educational research, activity aimed at establishing a Government-supported educational research agency entered a period of relative dormancy -- not to be re-activated until the late months of 1964.

#### Educational Research: Renewed Activity

The A.S.T.A. On November 7, 1964, the A.S.T.A. approved a resolution which asked the Government to establish an Educational Research Council which was to be financed from funds in the public treasury. (12:1) At the same time, the trustees incorporated into their Policy Handbook Policy 51.2, which reiterated both the A.S.T.A.'s belief in the value of educational research and the need for a Government-supported educational



research agency. (12) On January 7, 1965, the A.S.T.A., in its annual brief to the Alberta Cabinet, reaffirmed its policy statement and resolution of November, 1964. (10)

A letter. On April 10, 1965, Dr. T.C. Byrne, Chief Superintendent of Schools, delivered a paper entitled, "Research and Decision Making" at the University of Alberta, Calgary, in which he developed "The Three Legged Stool: Model for Research and development." The three legs of research and development were basic research or discovery; applied research or the practical application of newly discovered ideas; and development. (18)

In a letter to the Minister of Education on April 13, 1965, Byrne summarized his ideas on research and development and offered seven recommendations for the Minister's consideration. These were:

1. The establishment of a council for educational research and development not unlike the Alberta Research Council is indicated. This might be called the Alberta Council for Educational Research and Development.
2. The Alberta Research Council might provide the model for this proposed council for educational research. The same intermediate relationship between university and government should be established.
3. The proposed council would be concerned with the total three-pronged approach, although one can readily see that applied research and development would be central in its range of activities.
4. The proposed council (ACERD) should have available funds of such magnitude that it could undertake development programs that might test the validity of certain inventions now awaiting development.
5. The ACERD would undertake the solution of certain problems now requiring applied research and development.



6. The amount of money expended on research should approach one percent of the total expenditure on public education in the province yearly (about two million dollars).
7. Until the research and development efforts reach this magnitude, it is impossible to evaluate adequately the effects of research and development programs in education. Educational research has not yet had an opportunity to prove its usefulness to school improvement. (18)

Education Week. The need to keep educational research before the eyes of the public was recognized by the Alberta Education Council. As a theme for the Education Week activities of March, 1965, the Council chose "Educational Research -- Gateway to Progress."

Public Expenditure and Revenue Study Committee. On November, 23, 1963, the Government of Alberta established the Public Expenditure and Revenue Study Committee. The Committee was to make an in-depth analysis of public expenditures, their control, and their allocation," . . . having regard to the legitimate needs and best interests of the people of the Province as a whole." (43)

An assessment of Alberta education. By early 1965 the Committee had completed surveys of the Departments of Public Welfare, Highways, and Public Health.

In April of 1965, the Committee addressed itself to the study of the functional and operational status of the Department of Education. In addition, the Committee interpreted its terms of reference as including an assessment of the future needs of Alberta education. Alberta educators were prepared to mount a concerted effort in order to realize their educational research aspirations.





To this end, briefs were written and submitted to the Committee by a number of Alberta education-interest organizations.

Briefs. Briefs were submitted by the A.S.T.A., the A.T.A., the A.F.H.S.A., and the Alberta Catholic School Trustees' Association. Except for the latter, every brief made reference to the need for a Government-supported educational research agency.

The A.F.H.S.A. brief maintained that:

There is an urgent need for large-scale government grants to stimulate and support research programs that will assist in charting the future course for our schools, colleges and universities. Without research we cannot hope to secure reliable guide-lines to insure that future developments in our educational programs will keep pace with our rapidly changing economic and social situation. (7:8)

The A.F.H.S.A. brief recommended that the government establish a body to be known as a Research and Evaluation Institute. (7:8)

The brief presented by the A.S.T.A. also addressed itself, in part, to the need for expanding Alberta's educational research facilities. The brief recommended:

1. That there be established an Alberta Council on Educational Research, constituted similar to the Alberta Advisory Committee on Educational Research but free of direct university control.
2. That the Alberta Council on Educational Research or other appropriate agency be responsible for soliciting research proposals of all levels of research from any interested individuals and groups.
3. That, besides soliciting and supporting research projects in Alberta, the Council be charged with the responsibility of acting as a research clearing house through disseminating its own and other research findings and implications for practice pertinent to Alberta school operation and programs. (11:22-23)



In May of 1965, the Committee turned its attention to the study of other Government Departments and to the writing of an interim report. The proponents of educational research would have to wait until October, 1965, to see if their pleas to the Committee were effective. (48:vi)

A Position Paper. The end of the Committee hearings on Alberta education did not signal the end of the campaign to obtain Government financial support for educational research. On May 28, 1965, the A.S.T.A. published a position paper entitled "Educational Research." (12) The paper characterized Alberta's current educational research capability as limited, " . . . if not embarrassing." (12:3)

#### The Alberta Educational Studies and Development Council

A dinner meeting. In early June of 1965, various representatives of the A.A.C.E.R. met with the Minister of Education, Mr. R.H. MacKinnon. During the course of the meeting the discussion came to center on the means by which the status of educational research in Alberta could be enhanced. The flavor of the discussion was such that the representatives of the A.A.C.E.R. were convinced that the Government was becoming increasingly receptive to the idea of financially supporting an educational research agency. (33)

A letter. Their conviction was substantiated considerably when, on August 9, 1965, MacKinnon informed the Chairman of the A.A.C.E.R. that:

I have discussed the matter briefly with the Cabinet. The Cabinet could, of course, make no decision without some definite proposal. I then explored the possibility of meeting with the



whole Cabinet if a definite proposal were drawn up. Cabinet has agreed to meet with the A.A.C.E.R. on October 18, at 2:00 p.m. (34)

A meeting. Given this encouragement, the A.A.C.E.R., under the leadership of its Director of Educational Research, Dr. S. Hunka, addressed itself to the task of preparing a proposal. On September 1, 1965, six representatives of the A.A.C.E.R. met at the university campus in Edmonton. The questions put forth for resolution were:

1. Are we agreed that an institute is required to facilitate the solution of educational problems?
2. What arguments should be used in support of such an institute?
3. What general principles should be set for the development, organization and support of the institute?
4. The specific nature of the A.A.C.E.R. brief? (30)

In addition to affirming its belief in the need for an educational research institute, the meeting concluded with a request that the committee members submit working papers from which a brief would be composed. The actual task of writing the brief was borne by four individuals:

1. Dr. S. Hunka,
2. Dr. H.T. Coutts, Chairman of the A.A.C.E.R.,
3. Dr. T.C. Byrne, Chief Superintendent of Schools, and
4. Dr. S.C.T. Clarke, Executive Secretary, A.T.A. (19,33)

A postponement. With the date for the Cabinet meeting approaching, work on the proposal proceeded rapidly. The pace abated somewhat when, on October 7, 1965, MacKinnon notified the A.A.C.E.R. that the meeting with the Cabinet had been postponed to November 1, 1965. (35)





The postponement may have been a fortunate event for the A.A.C.E.R. for several reasons.

1. A letter from Hunka to the A.A.C.E.R. membership indicates that as late as October 19, 1965, the proposal was incomplete.  
(31)

2. In October, 1965, the Public Expenditure and Revenue Study Committee released an interim report. With respect to educational research the Committee recommended:

That a research unit in Education similar in structure to the Alberta Research Council and carrying out studies of a fundamental character be established. (48:60)

In addition, the Committee stated that, "The bulk of financial support should come from the Provincial Government." (48:60)

3. During the summer of 1965 the A.T.A. had initiated a series of long-range planning projects, one of which was devoted to educational research. Upon completion of the project, the A.T.A. advocated the establishment of an Educational Research and Development Institute of Alberta, " . . . which would be financed by grant from the Legislature and which would be advisory to the Minister of Education and the Cabinet."  
(16:21)

These events, as Byrne stated, " . . . tended to provide a different kind of climate of acceptance on the part of the Cabinet."  
(19)

The Cabinet meeting. On November 1, 1965, twelve representatives of the A.A.C.E.R. met with the Cabinet and discussed with them a brief which recommended that the Government establish an



Alberta Educational Studies and Development Council. (A.E.S.D.C.).

Objectives of the A.E.S.D.C. As objectives for the A.E.S.D.C. the brief identified:

1. To provide for studies designed to help the Minister of Education, the Cabinet, and others who are responsible for the expenditure of public funds to make decisions upon educational matters.
2. To provide for effective study of new developments in education and to assess the relevance of these to education in Alberta.
3. To provide for the most effective means of implementing those practices that will directly affect studies at all levels.
4. To provide assistance in the study of educational problems by teachers and local school boards. (3:3)

Encouragement. The representatives of the A.A.C.E.R., as Byrne noted:

. . . came away from that meeting feeling that the Cabinet had committed itself to the establishment of a research agency like this . . . . It looked as if the agency was on the road. (19)

The prime source of encouragement was a Cabinet request that the A.A.C.E.R. draft an act which could receive consideration at the up-coming legislative session. (33)

A Draft Act. Almost immediately, Hunka, Coutts, Clarke, and Byrne set themselves to the task of writing an act for the establishment of the A.E.S.D.C.

The Act that was written, Byrne stated, " . . . was based on an Ontario Act to establish the Ontario Institute for Studies in Education, and we used the science council's Act [Alberta Research Council] as a model." (19)



The Draft Act gave to the A.E.S.D.C. an organizational structure consisting of a nine member Board of Governors and a Director. As objectives, the Draft Act envisaged that the A.E.S.D.C. would:

- (a) . . . study matters and problems relating to or affecting education;
- (b) . . . coordinate the results of studies already completed;
- (c) . . . develop, revise, and assess plans, materials and procedures relating to or affecting education;
- (d) . . . disseminate the results of and assist in the implementation of the findings of such studies, developments, revisions, and assessments. (5)

A Proposal. While work on the Draft Act was proceeding considerable effort was being expended on a "Proposed Statement to the Cabinet in Further Explanation of the Proposed Alberta Educational Studies and Development Council." (4) Both the "Statement" and the Draft Act were written by the same individuals and came to be incorporated in a "Proposal." (5)

The "Proposal" suggested procedures for operationalizing the Council, costs, and initial studies for the Council.

The "Proposal" stated that the operationalization of the Council would require two years. In the first year a Director and Board of Governors would be appointed. During the first year these individuals would establish policy and plan for accommodation, equipment, staff, and the initial program. In the second year, a small core staff would be appointed. Seven in number, the core staff would include specialists in research and design, interpretation and analysis, curriculum, vocational education, architecture, school finance, and adult education. (5:1-3)





The "Proposal" suggested that studies might well be undertaken in the areas of manpower development, curriculum analysis, counselling, leisure, school buildings, utilization of teaching staff, and introduction of technological learning devices into the classroom. (5:4-14)

With respect to costs, the "Proposal" recommended a first year budget of \$200,000. As the activities of the Council increased financial support would also increase -- to the order of one per cent of the expenditures of the Department of Education. (5:14a)

Pressure groups. Concurrent with the work on the "Draft Act" and the "Statement" pressure was being exerted on the Cabinet to support an educational research agency. On November 15, 1965, the A.F.H.S.A., in its brief to the Government, urged that there be established an educational research institute. (8) On November 19, 1965, the A.T.A. submitted a brief which included a draft bill to establish an Alberta Educational Studies and Development Council. (15)

Not only were the A.T.A. and the A.A.C.E.R. proposals identical in name, but the intent of the two bills were similar. This interchange of ideas is suggested by:

1. The A.T.A. brief, which stated, " . . . the A.A.C.E.R. is at present preparing a draft bill of similar intent . . . " (15.6) , and
2. a letter of November 25, 1965, from Hunka to various members of the A.A.C.E.R., which stated:

As a result of the November 19th meeting of representatives of the A.A.C.E.R., the attached revision of a



proposed bill has been prepared. It is based in large part, but with revisions, on the draft prepared by the A.T.A. (32)

The exchange of ideas was not solely between the A.T.A. and the A.A.C.E.R., for during this period there emerged a coalition of many Alberta educational organizations. The coalition had but one objective -- to impress upon the Government the need for an educational research agency. The significance of this coalition was noted by the A.F.H.S.A. which wrote:

As an indication of the priority of this need, this is the first time that the above agencies, [A.F.H.S.A., A.T.A., A.S.T.A., the two Faculties of Education, and the Department of Education] representative of all those directly involved with improvement in education, joined forces and agreed upon a course to be presented to the government. (9)

Milton's Brigade. On December 17, 1965, the A.A.C.E.R. approved the "Proposal" and recommended that it be forwarded to the Government. (6) On December 29, 1965, Coutts sent copies of "A Proposal for the Establishment of an Alberta Educational Studies and Development Council" to MacKinnon. (22)

Their work completed, the A.A.C.E.R. could only wait to see if their efforts were to bear fruit. This period of cautious expectation is suggested in a letter written on January 10, 1966, by Clarke to Coutts:

As much as can be expected has been done by A.A.C.E.R. As Milton noted in the last line of "On His Blindness" -- "They also serve who only stand and wait." The idea is now before the Cabinet and we will join Milton's brigade. (21)

On January 28, 1966, having received no reaction to the "Proposal", Coutts wrote to MacKinnon:





. . . those of us who have been closely associated with the development of the brief and those of us who have the broader interests of education in the Province at heart are interested to know whether any favorable consideration will be given to the proposal which we set forth at your request. Not only is this a concern because of what we consider a definite social need but also because first, we would not like to see the Province of Alberta slip behind in the leadership which it has admittedly given in education in Canada and second, because we would not want to lose to those provinces which are now actively pressing forward in the field of educational studies and research (notably Ontario and Quebec) the highly trained personnel that we have in this Province. (23)

The last sentence of the letter is noteworthy, for at least two professors on the staff of the Faculty of Education had indicated that they were prepared to leave their positions if the "Proposal" failed to receive legislative approval. (47:52)

Postponement. On February 10, 1966, Coutts received the following communication from MacKinnon:

I can assure you at the outset that we are interested in the proposal, but it appears that it cannot be prepared in time for this Session.

As you know, much has been said about "War on Poverty", "Community Development", "Company of Young Canadians", "Manpower Requirements and Developments", in short, development of human resources. I think all of us in education regard development of human resources as our business, and, in fact, the brief presented seemed to cover most if not all of the areas mentioned above. The Government is definitely interested in this development, but since it cannot go forward this year I hope we may have further discussions during the year on this important project. (36)

On February 16, 1966, MacKinnon publicly announced the Government's intention to postpone action on the A.E.S.D.C. (24)

Protests. Byrne characterized the reactions of the proponents of the A.E.S.D.C. to the Government's announcement in the following manner:





It was at this time that the educational organizations became infuriated. They had a plan, . . . a lot of people had become identified with it, they felt they had the Cabinet committed, and then suddenly this happened. (19)

On February 17, 1966, the Edmonton Journal, in an article entitled "Educators Shocked, Bewildered by Research Plan Postponement," reviewed the reactions of several educators to the Minister's announcement.

Dr. A. Kratzmann, Executive-Director, A.S.T.A., stated:

The type of thinking that would permit such delays reflects a total disregard of the people of this province . . . Mr. MacKinnon has done nothing but housekeep since he took over his office 18 months ago -- and he hasn't done very well at that . . . This is one of the few issues which every group interested in education is solidly behind. (24)

Kratzmann's rebuttal to MacKinnon's assertion that legislation could not be prepared at such a late date was reported as:

That's balderdash. The Government could prepare a bill midway through the Legislature if it wanted to . . . The proposal has already gone through the whole process of study and the minister was involved in every step. (24)

The article quoted Clarke, in the following manner:

. . . we're disappointed. The time has long since passed when the province should have embarked on education research and development. Each year that goes by causes Alberta education to slip behind. (24)

Mrs. Betty Garbutt, ex-President of the A.F.H.S.A., described her reaction to the announcement as one of " . . . complete bewilderment." (26)

On February 19, 1966, Garbutt took the first steps towards setting a protest movement in motion. Garbutt identified two reasons for the protest. She felt that the Government had backed down on a promise and she also contended that during this period



the A.F.H.S.A.'s position in Alberta education was being questioned, hence the protest was initiated as " . . . a test to see if our organization possessed a significant voice in Alberta education." (26)

On February 22, 1966, the A.F.H.S.A. sent letters and petition forms to their local associations, the member organizations of the A.A.C.E.R., and thirty-two educational organizations supporting the Alberta Education Council. On February 23, Garbutt and three other individuals formed an 'action committee' which was to guide political action. The committee decided to ask two locals of the A.F.H.S.A. -- one urban and one rural -- to make personal representations to their M.L.A.'s and to make personal contact with members of the Cabinet. The objective of the committee's decisions was to have educational research debated on the floor of the Legislature.

By early March, 1966, the A.F.H.S.A. had collected supportive petitions from approximately eighty per cent of its membership. However, the A.T.A., the A.S.T.A., the member organizations of the Alberta Education Council, and Universities declined to give their support. The coalition among Alberta education-interest organizations that had emerged around the A.A.C.E.R. proposal was dissipating.<sup>1</sup>

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<sup>1</sup> The educators that were interviewed would not or could not elaborate on the reasons for the dissolution of the coalition. One can speculate, however, that many of the educators viewed a direct confrontation with the Government as being a futile endeavor, especially when the Premier refused to support their proposal. Selinger, in a study of the politics of Alberta educational policy decision-making, identified the Premier as the prime determinant of Government policy. (51:19) Further elaboration of the part played by the Premier and those close to him in rejecting the educators' proposal may be found on pages 32 - 39 of this study.





Baffled by this lack of support, Garbutt and the action committee sought a direct confrontation with the Calgary M.L.A.'s. On March 11, 1966, representatives of the committee met with twelve M.L.A.'s some of whom represented non-Calgary constituencies.

One of the committee representatives described the opening moments of the meeting as:

The moment the discussion was opened with our query about cancellation of the research program, they all pleaded ignorance. I was shocked when we were handed the notion that this was not only the first time that most of them had ever heard of a research institute for education but that the term brought no picture to them at all. (26)

After a lengthy and somewhat fruitless discussion, Mr. C. Johnson, Social Credit Party Whip, suggested that what the delegation wished was a discussion of the topic in the Legislature and proposed that he present a resolution to the House. Mr. Dickie, Calgary-Glenmore, agreed to second the motion:

Resolved that the Government give consideration to the setting up of a Committee of the Legislature to investigate the proper method of approach to setting up an Educational Research Board in the Province. (26)

The delegation left the meeting, satisfied that the resolution would reach the floor of the Legislature. However, no one mentioned to the group that the resolution would have to be approved by the Social Credit caucus. When the action committee was made aware of the resolution they immediately sought a re-phrasing of the resolution to one which would ensure debate in the Legislature.

On March 14, 1966, Garbutt went to Edmonton and sought the approval of Johnson and Dickie to a rewording of the resolution. Johnson refused his consent of the new resolution and acknowledged that the Social Credit caucus had denied the original resolution.





The next day, Garbutt appealed to MacKinnon for support, but he refused. (26)

On March 22, 1966, a delegation from the High River local of the A.F.H.S.A. met with several M.L.A.'s to press for action. Their plea for the establishment of an educational research institute was rebuffed. At this point, one M.L.A. assured the group that at the next session of the Legislature a bill would be brought forward for the establishment of a human resources research institute. He further asserted that educational research would be one of the primary activities of such an institute. When asked to be more explicit, the M.L.A. declined, stating that the Government was in the process of gathering information. (26)

Reconciled to a lack of support from other educational organizations and an apparent Government commitment to a human resources research institute, the A.F.H.S.A. called the protest movement to a halt.

#### The Search for the "fly in the ointment"

When the M.L.A.'s intimated that the objectives of the A.E.S.D.C. were to be expanded, so as to include research which would facilitate the development of human resources, many educators sought to determine " . . . the source of this backing-up . . . . " (19)

Investigation as to the source revealed a vast range of opinions. Allusions to a prominent University of Alberta sociologist, some staff members of the Faculty of Education, and various political pressure groups were common. Casting aside these individuals and groups as being of minor consequence in influencing the direction taken by the



Government, the interviewees tended to focus on three individuals as being major influentials -- the Honourable E.C. Manning, Premier of Alberta; Mr. Preston Manning, the Premier's son; and Mr. Erick Schmidt, Special Consultant to the Executive Council of Alberta. Of this group, it was Schmidt who was cast by some of the educators in the role of Svengali.

Byrne's characterization of Schmidt was typical of the perception held by educators, "Erick Schmidt was a rather mythical figure . . . . He was looked upon, because nobody knew him, with some suspicion because it looked like he was putting the 'fly in the ointment.'" (19)

Thus, while many educators acknowledged that the Premier and his son played significant roles in aborting their plan, a greater number appear to have perceived Schmidt as being the dominant figure. Such a perception, however, must be viewed in the light of a trend in Government policy which pre-dated Schmidt's entrance into Government service. The trend in policy was that of an increasing emphasis on developing Alberta's human resources.

### III. ACTIVITIES AIMED AT ESTABLISHING A HUMAN RESOURCES RESEARCH AGENCY IN ALBERTA

#### Human Resources Development -- A Shift in Government Policy

During the first half century of Alberta's provincehood, as the White Paper on Human Resources Development noted:

. . . there was an understandable emphasis on, and preoccupation with, physical resources development. In this pioneer period the primer consideration was provision for human survival rather than human development. Since physical resources development





is the first prerequisite to human survival, it was consequently given highest priority. (27:23)

By 1963, as MacKinnon stated:

We thought we had reached a point in Alberta where a fairly good job had been done in physical resources development -- we had broken enough ground where we could feed the people. [We asked] 'What needs to be done to improve the quality of life?' . . . the scales had been tipped in favor of physical resources development -- we wanted to tip them in the other direction. (37)

The tipping of the scales toward the human component led to a shift in Government policy emphasis. In enunciating the rationale underlying the shift in policy emphasis E.C. Manning asserted:

Going back to 1963, I became both interested and, in some respects, concerned with the need in Government for a shift in emphasis, more to the human component . . . I sensed the shift of public concern into the humanitarian field and felt it was the responsibility of Government to keep abreast of such concern and, in fact, to give leadership in it.

#### The Need for Coordination

To a great extent, the shift in policy emphasis was responsible for the establishment of a great number of Government programs whose prime objective was the enhancement of Alberta's human resources. By 1965, the rapid proliferation of programs had created severe policy-making and administrative problems. (50)

In essence, the problems stemmed from the methodology employed in designing and implementing the programs. Each program was conceived in, and was the responsibility of, a Department of Government. The end result of this state of affairs was that a program often overlapped with or duplicated the efforts of another program. (50)





A further consequence of the procedures used to design and implement the programs was identified by E.C. Manning in the following manner:

One of the problems in the complexity of government today, where everything is so departmentalized, is that you get Departments or divisions of Departments concentrating on what are very real problems, but not the total problem . . . . There are certain phases of the total problem that are within their jurisdiction, but the danger is that they think it is the whole problem, and they overlook the fact that when the matters within their particular jurisdiction have been resolved, you still haven't solved the whole problem. (39)

Concurrent with the emergence and growth of these problems was the release of two interim reports, in March and October of 1965, by the Public Expenditure and Revenue Study Committee. (48:IV) These reports: (1) provided an estimate of the revenue requirements of the Government, (2) suggested the need to reassess existing Government programs, and (3) recommended the establishment of new programs.

With the interim report providing an assessment of the fiscal, structural, and functional status of its Departments, as well as the increasing realization that its many programs were in need of reassessment, the Government moved, as E.C. Manning stated, to conduct:

. . . a study in the various departments of Government where there were programs that related to the human resources field, to get a picture of what was now in operation, and how these might be co-ordinated. (39)

#### Erick Schmidt Enters Government Service

On December 7, 1965, the Government appointed Schmidt, a doctoral student in the Department of Sociology, University of Alberta, to the position of Special Consultant to the Executive Council, with responsibility for instituting " . . . a program for research on the



matters of poverty and opportunity . . . ." (44) The immediate task, as Schmidt related to an Edmonton Journal reporter, was " . . . to assimilate information on what is currently being done by the hundreds of agencies involved in work related to the poverty and opportunity program." (10)

To this end Schmidt began compiling in inventory form, all the various social services available to the citizens of the Province. (50)

#### Erick Schmidt Becomes an Influential in Government

Due to his position as Special Consultant, the relationships he was able to establish, and the expertise he possessed in matters pertaining to poverty and opportunity, Schmidt was to acquire considerable influence in shaping Government policy dealing with the development of human resources.

The position of Special Consultant, on a full-time basis, was unique in the Alberta Government. The position was one of investigating any matter requested by the Executive Council. As a result, Schmidt was responsible only to the Executive Council -- not the Legislature. Consequently he was able to establish close relationships with those who set Government policy.

In conjunction with the position of Special Consultant, Schmidt also became a one-man Human Resources Development Office. (H.R.D.O.) The H.R.D.O., as described by E.C. Manning, " . . . was not used officially or even publicly, to my knowledge. It was an appendage to the Executive Council. We only engaged the one man on this, which was Erick Schmidt." (39)



Thus, through the positions of Special Consultant and head of the H.R.D.O., Schmidt came to be knowledgeable in matters pertaining to the development of Alberta's human resources. By virtue of having this information, Schmidt was able to acquire considerable influence among members of the Executive Council.

Besides the relationship he was able to establish with the Executive Council, Schmidt either sought out or was brought into the confidence of the Premier and the Premier's son, Preston. This "Kitchen Cabinet," as one interviewee described it, was to have a profound effect on the development of Government policies pertaining to the development of human resources in Alberta.

Eaton Howitt, the Legislative reporter for the Edmonton Journal, depicted the significance of this relationship in the following manner:

From his office in the basement of the Legislative Building, Mr. Schmidt and his university colleagues have much to do with the new path Social Credit is following. One of the colleagues, and friends, is Preston Manning, son of the premier.

. . . There is no question that Preston Manning has been the driving force behind the sudden change in the party's political thinking. It is even easy to imagine the intimate chats over coffee in the morning in the Manning farm home . . . . (29:61)

In addition, interviews with the three men revealed that each held a deep respect for the ideas and abilities of each other. The closeness of the relationship is evident when in mid-1966 Schmidt and Preston Manning were asked, by the Premier, to commence work on a White Paper and a book which was to express the Premier's political philosophy. (Anonymous)<sup>2</sup>

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<sup>2</sup> Hereafter the term Anonymous is used at the request of the respondent.





### Schmidt Receives the A.A.C.E.R. Brief

In early January, 1966, Schmidt, in his role of Special Consultant, received a copy of the A.A.C.E.R. "Proposal for the Establishment of an Alberta Educational Studies and Development Council." (50) He was asked, by the Executive Council, to examine the "Proposal" and to make recommendations as to its disposition. (50)

Schmidt's reaction to the "Proposal" can be gauged from notations inscribed on his copy. With apparent reference to the 'spirit' of the "Proposal" Schmidt wrote "Defensive," and "Value orientations of teachers." (50:Title Page) Perusal of the "Proposal" apparently convinced him that the scope of the A.E.S.D.C. extended beyond the borders of educational research. This conviction can be seen in such notations as, "Rel [Related] to economics", "This is now economics", "Beyond educational research", "Cultural values and activities", and "Alta [Alberta] Research Council". (50:5-11) Further evidence of this conviction was obtained from Schmidt's notation on the "Draft Act" which had been appended to the "Proposal." With reference to the objectives of the A.E.S.D.C., Schmidt wrote, "Broaden". (50:15)

To the "Proposal" Schmidt appended a page containing Sections 3 and 4 of the "Alberta Research Council Act." On this page may be seen the aborting of the A.E.S.D.C. and the conception of a research agency which would facilitate the development of Alberta's human resources.

At the bottom of the page Schmidt wrote, "Human Resources Research Council O.K.". (50)



### The Executive Council Acts Upon the A.A.C.E.R. Brief

Despite Schmidt's apparent rejection of the A.A.C.E.R. proposal, the decision to postpone legislative action, was made by the Executive Council. As the major influential in this decision one individual can be identified.

The dominant force in the Government was the Premier. Thirty years of Government service, including twenty-two as Premier, firmly established E.C. Manning as the prime determinant of Government policy. (51:19)

Commenting on the A.A.C.E.R. "Proposal" E.C. Manning attributed the lack of legislative action, and the lack of his personal approval, to the A.A.C.E.R.'s refusal to accept a research agency which was not bound solely to education. He stated:

I think that it would be fair to say that they [the A.A.C.E.R.] did some reassessing as a result of our initial discussions. At our second meeting [no record of a second meeting was found, rather the reference appears to be to the proposal of December 29, 1965] they restated their great concern in that field and urged that we set up the form of educational research structure they had proposed. We reiterated our conviction that this [A.E.S.D.C.] should be broadened, in fact our conviction was even stronger by this time because, in the interval, we had given a lot of thought to the total human resources development concept. (39)

E.C. Manning requested that the Executive Council postpone further action on the A.A.C.E.R. proposal. The Executive Council agreed. (Anonymous)

### The Human Resources Development Movement Gains Momentum

In March, 1966, the Public Expenditure and Revenue Study Committee submitted its final report. In its conclusion the Committee stated:



The demand and scope for ever higher levels of expenditure . . . suggests that the Government may have to pay closer attention to the establishment of . . . a list of priorities. We would list these priorities in broad terms as follows:

- A. The Development of Human Resources. . . .
- B. The Development of Physical Resources. (48:128)

The role that the Committee's recommendations played in directing the events during the next year was explained by MacKinnon:

As each of us [Cabinet Ministers] looked at the recommendations . . . we came up with a short term approach for some and a long-range approach for others. . . . As a result of going over these recommendations, and seeing what each of us was supposed to do in the implementation of the recommendations, we decided to put out the White Paper which gave the long-range implementation. (37)

Structural deficiencies. During the course of compiling the inventory of social services available to the citizens of Alberta and through discussions with the Executive Council, Schmidt became cognizant of various obstacles to effective policy-making. These obstacles he termed "Structural deficiencies." (50) The deficiencies were four -- data analysis, data interpretation, implementation, and 'feed-back.'

As each program became operative, as well as during the course of its operation, data pertaining to the problem(s) the program was designed to solve were in the words of MacKinnon, " . . . gathered by the tons . . . " (37) The problem was not lack of data but inability to analyze it. Consequently many programs were unable to provide an accurate appraisal of the extent to which they were meeting their objectives.

What little data were analyzed often created further problems for Government decision-making. MacKinnon noted that, "Many times in decision-making for human resources development the total Cabinet did





not have as much time as we would have liked . . . ." (37)

Furthermore, as Preston Manning noted, data which had been analyzed and interpreted, often failed to be interpreted in a manner which would bridge the gap between scientist and politician. (40)

The foremost deficiency, that of implementation, was discussed earlier in this chapter. (see page 34)

Traditionally, Government has obtained a response as to the effectiveness of its programs through the ballot or political lobby. Such forms of feed-back tended to reflect the belief of only a portion of the citizenry, as well as tending to offer the Government a diversity of opinions, many of which are contradictory. Preston Manning characterized the problem of feed-back as:

There have always been some general means of measurement - elections and the reports of M.L.A.'s regarding the feelings of their constituents; also the reports of civil servants concerning the programs they administer. But the information received through these channels alone does not always give a complete or accurate picture. Reports received from M.L.A.'s on the effectiveness of Government programs may be prejudiced by political considerations. Information received through civil service channels has been "filtered" considerably before it reaches the Minister or the Executive Council.

The Community Opportunity Assessment Studies. On March 29, 1966, Dr. C.W. Hobart, a sociologist at the University of Alberta was appointed Director of Research with responsibility for conducting a series of studies known as the Community Opportunity Assessment Study. (45) The Study surveyed eight areas of the province of which six were rural and two were urban.

In a speech to the Legislature on March 17, 1967, the Premier outlined the rationale for the Study:



These were areas selected because of the problems of under-development. We thought these were good typical cases of under-developed and under-privileged areas, where it was important to get factual information as to the causes, and the nature of the problems, and what steps might be taken to alleviate those conditions. (38:1)

The commissioning of the Study was due, in large part, to the efforts of Schmidt. Indeed, the results of the Study were to be forwarded to him, in his new role of Co-ordinator, Human Resources Research and Development, in charge of the Human Resources Development Office. (46)

### The White Paper is Conceived

The recommendations of the Public Expenditure and Revenue Study Committee ; awareness of the structural deficiencies; preliminary findings from the Community Opportunity Assessment Study; and the firm conviction of the Premier, resulted in the Executive Council becoming convinced that there was a need to consolidate its thinking on human resources development.

E.C. Manning commented on the thinking of the Executive Council during the autumn of 1966.

It would be by 1966 that we had decided to definitely put this material into a White Paper. A White Paper is used by a government to announce an important new policy . . . we had decided . . . that for the foreseeable future the whole orientation of Government policy and Government legislation should be towards the human component . . . and that this was of sufficient importance to the people of the province that it should be embodied in some formal document. (39)

### The White Paper is Written

Although only three individuals were involved during all phases of the writing, the White Paper was the product of the efforts of



several individuals. (39, 40, 50)

The Premier, his son, and Schmidt were the authors of the White Paper. Preston Manning brought to the White Paper the systems approach to organizational policy-making and administrative decision-making, while Schmidt brought his knowledge and expertise of the needs to be met in developing Alberta's human resources. The Premier re-wrote the first draft with a view as to what he was prepared to commit the Government too. (39, 40, 50) The Cabinet, but not the Social Credit M.L.A.'s became involved with the White Paper in late-October, 1966.

Preston Manning characterized the role played by the Cabinet in writing the White Paper as:

. . . the White Paper went through eight to twelve re-writings. After the first two or three, the Premier and the Cabinet went through it. Gradually it became the document which was finally published. (40)

#### The White Paper -- An Integration of Two Themes

Undoubtedly the orientations of Preston Manning and Schmidt directed the White Paper towards a position of integrating the systems approach and the human resources development theme.

The key to the systems approach, as viewed by Preston Manning, was its ability to look at organizations or Government programs as a constellation of components which together form inter-related inputs and outputs. He stated:

In order to rigorously define or model a "system" it is necessary to perceive and define the inter-relationships between its component parts. This makes the "systems" approach particularly applicable to the analysis of problems of integration and co-ordination in complex organizations.





In utilizing the systems approach, Preston Manning and Schmidt considered nine steps as being fundamental.

1. Specification of objectives.
2. Determination of the functions which have to be performed to achieve the objectives.
3. Designing a system, including component parts, inputs, and outputs, that would perform the functions.
4. Determination of the relationships between the system and other systems.
5. Examine policies presently operative.
6. Compare theoretical system with operative system to discover over-lapping, duplication or gaps.
7. Specify alternative courses of action.
8. Perform cost-benefit analyses on the alternatives.
9. Implementation. (40)

Schmidt's human resources development orientation resulted in the establishment of a grid which conceptualized the functions and objectives of human resources development. (50) (Figure 2)

With respect to the grid Preston Manning commented:

Traditionally governments began to deal with the problems of human development and under-development through policies and programs of a "maintenance and custodial" nature . . . In recent years the trend has been toward policies and programs of a "rehabilitative" nature . . . The future goal however is to perfect and concentrate policies and programs of a "developmental and preventative" nature - policies that will provide a healthy developmental environment for every individual and prevent deficiencies in physical and mental health, value and aspirational health, and knowledge and skills from occurring at all. Obviously, the more resources a society is able to successfully commit to performing the development-prevention function, the less it will be required to spend on either rehabilitation or maintenance. (40)



FIGURE 2

FUNCTIONS AND OBJECTIVES OF A HUMAN RESOURCES

DEVELOPMENT PROGRAM (40, 50)

FUNCTIONS

Development and Prevention      Rehabilitation      Maintenance and Custodial Care

OBJECTIVES

Physical and Mental Health	Preventive Health Programs	Active Treatment Hospitals	Mental Hospitals
Values and Aspirations	Supportive Family Services	Counselling Services	Penal Institutions
Knowledge and Skills	Schools and Universities	Adult Re-training Programs	Pensions



With the systems approach giving a procedure by which policy might be determined, and the grid giving a crude outline as to possible areas upon which Government policy might concentrate, Schmidt and the younger Manning set about establishing an operational model for Government policy-making in human resources development. To this end the two men constructed a flow chart which is illustrated by Figure 3. (40)

The systems approach, the grid, and the flow chart, in combination, constituted the core around which the White Paper was built. As a result, the Premier noted in a speech to the Legislature on March 17, 1967, the White Paper came to embody a comprehensive Government approach to the enhancement of Alberta's human resources. (27:3)

#### A Human Resources Research Council

In their deliberations as to the social data analysis capability of the Government, Schmidt and Preston Manning concluded that:

There was a feeling that the Government's capability for analyzing "social data" was not as strong or as sophisticated as it should be. There was need for developing a strong interdisciplinary research capability in the socio-economic development field - a function which the Government was not equipped to perform adequately at the time. (40)

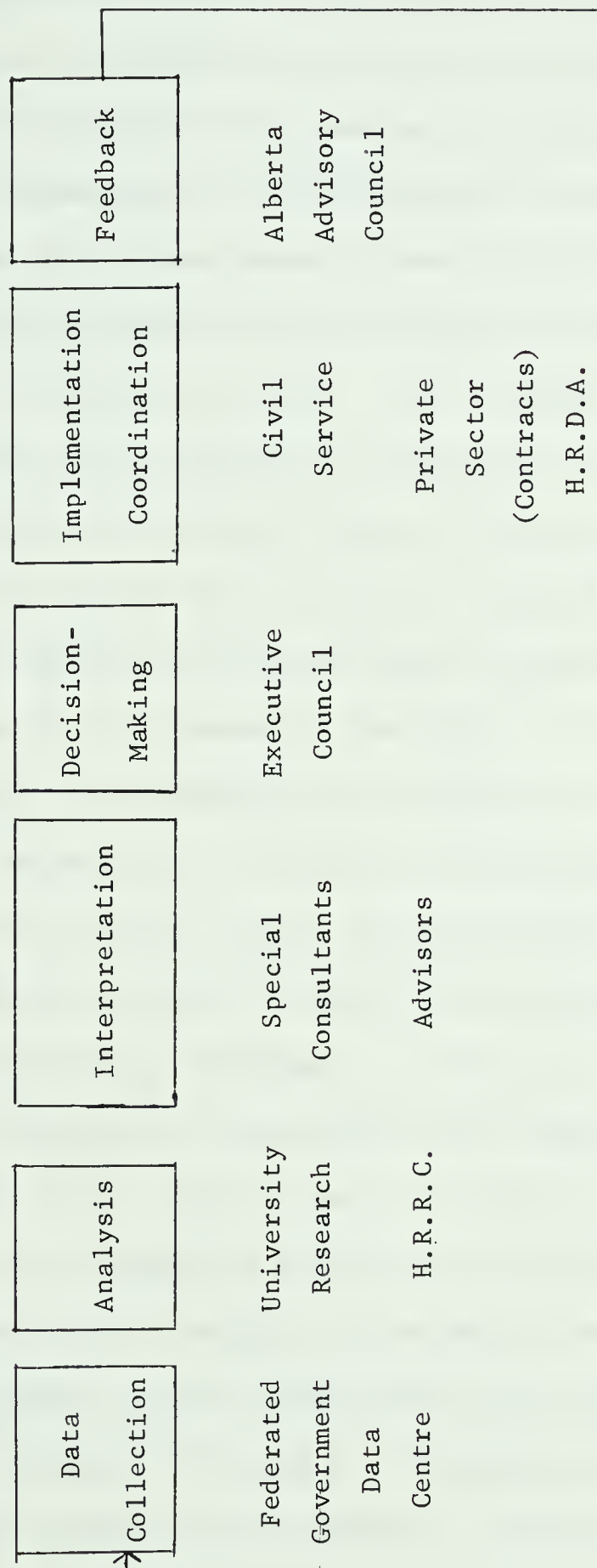
To improve the Government's social data analysis capability, so as to facilitate a Government program of human resources development, the Premier, Preston Manning, and Schmidt saw as being imperative the establishment of a Human Resources Research Council. (39, 40, 50)





FIGURE 3

FLOW CHART FOR GOVERNMENT POLICY-MAKING  
IN HUMAN RESOURCES DEVELOPMENT (40)





#### IV. SUMMARY

In 1953 Alberta educators began a campaign aimed at obtaining funds for educational research from the public treasury. In 1959 the educators were successful in having their requests promoted by the Government-appointed Royal Commission on Education. The Commission also recommended the establishment of an organization modelled after the Alberta Research Council which would employ an inter-disciplinary team of social scientists who would study the future needs of Alberta education. The Government, however, chose not to implement the Commission's recommendation for the establishment of the Alberta Educational Planning Commission.

During the years 1960 to 1964, the proponents of a Government-supported educational research agency directed little public effort towards the achievement of their goal. During this period, however, a shift in Government policy emphasis began to develop. The shift in emphasis was to result in the development of Alberta's human resources becoming a policy of top Government priority.

In 1965 the educators renewed their campaign and were successful in obtaining the support of the Minister of Education and the Public Expenditure and Revenue Study Committee. In the autumn of 1965, Byrne, Clarke, Coutts and Hunka prepared a proposal which asked the Government to establish the Alberta Educational Studies and Development Council. In November, 1965, the educators met with the Cabinet and were requested to write draft legislation for the establishment of A.E.S.D.C. In December, 1965, the draft legislation was submitted to the Cabinet. On February 16, 1966,



the Government announced that it was postponing legislative action on A.E.S.D.C. In February, 1966, the Alberta Federation of Home and School Associations initiated a protest of the Government's decision. The protest failed to obtain the support of many Alberta educators and was abandoned in March, 1966.

During a meeting with a number of M.L.A.'s, the representatives of the A.F.H.S.A. were informed that the Government was studying the possibility of establishing a human resources research institute.

The expression of Government interest in establishing such an institute grew out of the problems encountered by the Cabinet in setting policies for implementing human resources development programs. By December, 1965, the number of programs had become so great that the Cabinet appointed Erick Schmidt to the position of Special Consultant with responsibility for co-ordinating the programs. In January, 1966, Schmidt recommended to the Premier that the educators' proposal be expanded to include all human resources. The Premier, with whom Schmidt had established a close relationship, concurred with Schmidt and submitted the recommendation to the Cabinet. The Cabinet, in turn, agreed to postpone legislative action on A.E.S.D.C.

In the autumn of 1966, the Premier, his son Preston, and Schmidt began writing the White Paper which outlined a comprehensive approach to developing Alberta's human resources. H.R.R.C.'s role in the development of human resources, was to be one of enhancing the Government's social data analysis capability.





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## CHAPTER III

### AN ACT TO ESTABLISH THE ALBERTA HUMAN RESOURCES RESEARCH COUNCIL

#### I. INTRODUCTION

The preceding chapter related the events which led to:  
(1) the conception of the idea of a Human Resources Research Council, and (2) the decision of the Premier to proceed with the establishment of such an agency. This chapter describes the events which occurred subsequent to the Premier's decision to proceed with the establishment of H.R.R.C. and which lead to the granting of Royal Assent to H.R.R.C.

With regard to the collection of data for this chapter, three constraints are noteworthy.

1. The Legislative Assembly of Alberta does not maintain a Hansard.<sup>3</sup>
2. The Minutes of Executive Council meetings are not open to public scrutiny.
3. Members of the Executive Council maintain a vow of Cabinet solidarity and secrecy.

#### II. THE WRITING OF BILL 28

##### An A.E.S.D.C. Loss -- An H.R.R.C. Gain

The proponents of the A.E.S.D.C. proposal lost their closest

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<sup>3</sup>The term Hansard refers to the printed record of the proceedings of a legislative body, such as the Canadian and British Parliaments.



link with the Government in October, 1966, when Byrne declared himself as being in favor of establishing H.R.R.C. While many educators claimed that Byrne switched his support for political reasons, for in June of 1966 he had been appointed Deputy Minister of Education, Byrne contended that the switch grew out of the compatibility of his interests in the social sciences and the inter-disciplinary approach envisaged for H.R.R.C. Byrne, however, lent some credence to the educators political pressure hypothesis when he stated:

Civil servants learn to 'roll with the punch' to take a look at what is possible, to back up and say, 'Okay let's start over again, we can achieve what we want in a different way.' (6)

#### A Proposal

The switching of support was to result in Byrne becoming involved in the writing of the draft legislation for H.R.R.C. Commenting on his role in the writing of the draft legislation, Byrne stated, "I was always trying to save as much as possible for education and Erick was always trying to broaden it a bit. We were always coming to some sort of compromise. (6)

In early November, 1966, Byrne and Schmidt wrote a "Proposed Draft: An Act to Establish the Alberta Human Resources Research Council." (21) The "Draft" gave to H.R.R.C. an organizational structure consisting of a ten-member Board of Governors and a Director. With regard to function, the "Draft" noted that, " . . . the Human Resources Research Council is to study ways and means of developing the human resources of the Province of Alberta." (21)



The amount that Byrne was able to save for education is suggested in Figure 4, which compares the structural and functional features of the proposed A.E.S.D.C. and the proposed H.R.R.C. Figure 4 suggests that the proposal for the H.R.R.C. was developed from the proposal for the A.E.S.D.C., the writing of which involved Byrne. Furthermore, the proposal for H.R.R.C. preserved the educational research feature of the proposed A.E.S.D.C.

#### Draft No. 1 and Draft No. 2

Draft No. 1. On December 7, 1966, the Executive Council received Draft No. 1: "An Act to Establish the Alberta Human Resources Research Council." (9) In the main, "Draft No. 1" was a reproduction of the "Draft" of November, 1966. After study of "Draft No. 1," the Executive Council suggested that minor revisions were in order, and that these might be done by Byrne and Schmidt. (6, 23)

Draft No. 2. "Draft No. 2" was submitted to the Executive Council on December 16, 1966. Although the wording of "Draft No. 2" varied considerably from that of its predecessors, the structural and functional attributes which the earlier "Drafts" had given to H.R.R.C. were preserved. (10) Upon completion of their study the Executive Council forwarded "Draft No. 2" to the Government lawyers who were to ensure its legality. (6, 23)

#### The Educators Protest

An announcement. On November 7, 1966, at the annual convention of the A.S.T.A., MacKinnon formally announced the Government's





FIGURE 4

COMPARISON OF THE PROPOSED A.E.S.D.C. AND THE

PROPOSED H.R.R.C. OF NOVEMBER, 1966 (1, 20)

	A.E.S.D.C.	H.R.R.C.
STRUCTURE	Nine member Board of Governors.	Ten member Board of Governors.
FUNCTIONS	<p>a. To study matters and problems relating to or affecting education;</p> <p>b. To coordinate the results of studies already completed;</p> <p>c. To develop, revise, and assess plans, materials and procedures relating to or affecting education;</p> <p>d. To disseminate the results of and assist in the implementation of the findings of such studies, developments, revisions, and assessments.</p>	<p>a. To study matters relating to and affecting human resources development and the conservation of human resources such studies to include those directly applicable to education;</p> <p>b. To coordinate the results of studies already completed;</p> <p>c. To develop, revise, and assess plans, materials and procedures relating to or affecting education and other aspects of human resources development;</p> <p>d. To disseminate the results of and assist in the implementation of the findings of such studies, developments, revisions and assessments.</p>



intention to establish H.R.R.C. Prior to this official statement Alberta educators had been informed, through informal channels, of the Government's intentions. As a result of these informal communications the proponents of the A.E.S.D.C. were convinced that a frontal attack on the H.R.R.C. would prove futile. Consequently the protests that followed the official announcement were aimed at underscoring the need for H.R.R.C. to become actively involved in educational research.

Questions. Following the announcement, Dr. W.E. Smith, president-elect of the A.S.T.A., directed four questions to MacKinnon:

1. Will the Council's director be an educator?
2. Will the administrative structure of the council allow in-depth study in education?
3. What will be the extent of human resources research outside the field of education?
4. Is the Government willing to provide enough money for educational research as well as the other areas of human resources research? (22:59)

To these questions MacKinnon declined an immediate reply.

The A.T.A. brief. On December 16, 1966, the A.T.A. presented its annual brief to the Executive Council. The brief asserted that:

The Association recognizes that 'human resources' is broader than education, but believes that, for the ordinary citizen, education is the primary means of developing his resources. For this reason, the major emphasis of the proposed council should be on education. . . . (4)



The brief requested that the Government:

1. Seat seven educators on the council's ten-member board of directors,
2. Appoint an educator as director of the Council, and
3. Provide financial support which would ensure the carrying out of a broad program of educational research. (4)

The A.S.T.A. brief. The A.S.T.A. brief of December 20, 1966, also asked the Government to give a central position to educational research in the proposed council. The brief stated:

This Association would prefer a research body charged exclusively with the responsibility of conducting research in education. The proposed Human Resources Research Council, however, may help to meet this request if research in education is given top priority. (3:13)

A.A.C.E.S. At the December 8, 1966, meeting of the Alberta Advisory Committee for Educational Studies (formerly the A.A.C.E.R.), Schmidt discussed the proposed H.R.R.C. Schmidt's claims that educational research was to be a major activity of H.R.R.C. were countered by claims that H.R.R.C.'s mandate was too broad, thus educational research would be relegated to a subordinate role. (2)

The meeting concluded with the passage of two resolutions -- one of which deplored the lack of communication between the Government and the A.A.C.E.S. during the planning stages of H.R.R.C., and one which asked the Government to reconsider the proposal for the establishment of the A.E.S.D.C. (2)





Bill 28

In January, 1967, the Executive Council approved "Bill 28: An Act to Establish the Alberta Human Resources Research Council." (11)

"Bill 28" was, in the main, a reproduction of "Draft No. 2" which had been sent to the Government solicitors in December of 1966. One substantial change, however, was made. The specific objectives of H.R.R.C. were expanded so as to leave little doubt that educational research was to be a major concern of H.R.R.C. Section 3 (d) stated that an objective of H.R.R.C. was, "to establish directly or assist in the establishment of developmental studies in the field of education." (11)

It appears that Section 3 (d) was inserted as a means of satisfying the requests of Alberta educators. E.C. Manning confirmed this hypothesis when he stated;

There had been some concern expressed by these groups, who had been urging an educational research structure, . . . we wanted them to be fully informed that educational research was going to have the emphasis it deserved. (20)

### III. FROM BILL 28 TO ROYAL ASSENT

The Throne Speech. On February 9, 1967, the Lieutenant-Governor of Alberta opened the Fifth Session of the Fifteenth Legislative Assembly of the Province of Alberta with the traditional "Speech from the Throne." Outlining the Government's legislative program for the Session, the "Speech" announced a broad program aimed at developing and conserving Alberta's human resources. The "Speech" went on to state:



A Bill will be introduced establishing a Human Resources Research Council, whose functions will embrace educational research and related spheres pertaining to the intellectual, cultural and social progress of society. While educational research will be one of the major disciplines receiving the Council's attention, it will also be involved with such social sciences as economics and sociology. (12)

First Reading. On February 10, 1967, MacKinnon tabled "Bill 28" in the Legislative Assembly of Alberta. According to parliamentary tradition the tabling constituted First Reading. That is, a piece of legislation is introduced to the Legislature so the members can study the "Bill" prior to the commencement of debate.

Replies to the Throne Speech. On February 10, 1967, Mr. M. Senych, M.L.A. for Redwater, contended that social change was a dominant factor in Alberta society. Consequently, he noted, H.R.R.C. could serve to identify problems resulting from social change, search for solutions to the problems, and devise " . . . techniques for identifying and solving the problems . . . ." (24) On the same day, Mr. E. Benoit, M.L.A. for Okotoks-High River, stressed that educational research should be prominent in H.R.R.C.'s research endeavours. (5)

On February 14, 1967, Mr. J. Horan, M.L.A. for Edmonton-Jasper Place, asserted that legislative approval of "Bill 28" was of " . . . top priority." (16) The Honourable L.C. Halmrast, Minister of Public Welfare, pointed out that, "If we are going to talk about human resources then surely we should talk about education . . . ." (15)



On February 16, 1967, the three member Opposition expressed their doubts that H.R.R.C. could serve both education and the other social sciences. Mr. W. Dickie's comments were typical of the sentiments expressed by the Opposition;

So they've got another Board in Alberta to determine about people . . . I don't know whether they're going to come up with any new answers. I think one of the interesting features . . . would be that they are challenged with taking over Educational Research. I don't think the two will tie in and it's Educational Research that I think was asked for by the people of Alberta. (8)

On February 20, 1967, MacKinnon rose in the Legislature and underscored the significant position education held in developing the human resources of society. He stated:

I would be remiss in my duty as Minister of Education if I did not emphasize that in the development of Human Resources the school system . . . holds a central position . . . we hope that research and development in education will be among the most vigorous activities of the Council . . . . (18:2--21)

MacKinnon went on to state that the primary concerns of H.R.R.C. were to be found in the field of education. He summed up H.R.R.C.'s role in educational research with the statement, "These then are the key words: To evaluate, to plan, and to improve." (18:21)

Second Reading. On February 21, 1967, "Bill 28" received Second Reading -- approval in principle -- and was referred to the Committee of the Whole Assembly for clause by clause study.<sup>4</sup> (17)

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<sup>4</sup>As no records are kept of the proceedings of the Committee of the Whole Assembly, the investigator was unable to obtain a verbatim account of the debate over "Bill 28."





In his recollection of the debate, E.C. Manning, stated:

"It was a Bill that met very wide acceptance, there was practically no opposition to it." (20) Support for E.C. Manning's assertion was found in many quarters. As one government M.L.A. commented, "To oppose the concept of human resources development was to oppose motherhood." (Anonymous)

### The White Paper is Tabled

On March 17, 1967, the Premier tabled, in the Legislature, a White Paper on Human Resources Development. In tabling the Paper the Premier stated:

. . . I regard this White Paper as the most significant and in many respects, the most important public document that this Government has produced in the more than thirty years that we have had the responsibility for the administration of public affairs in this province. (19:3)

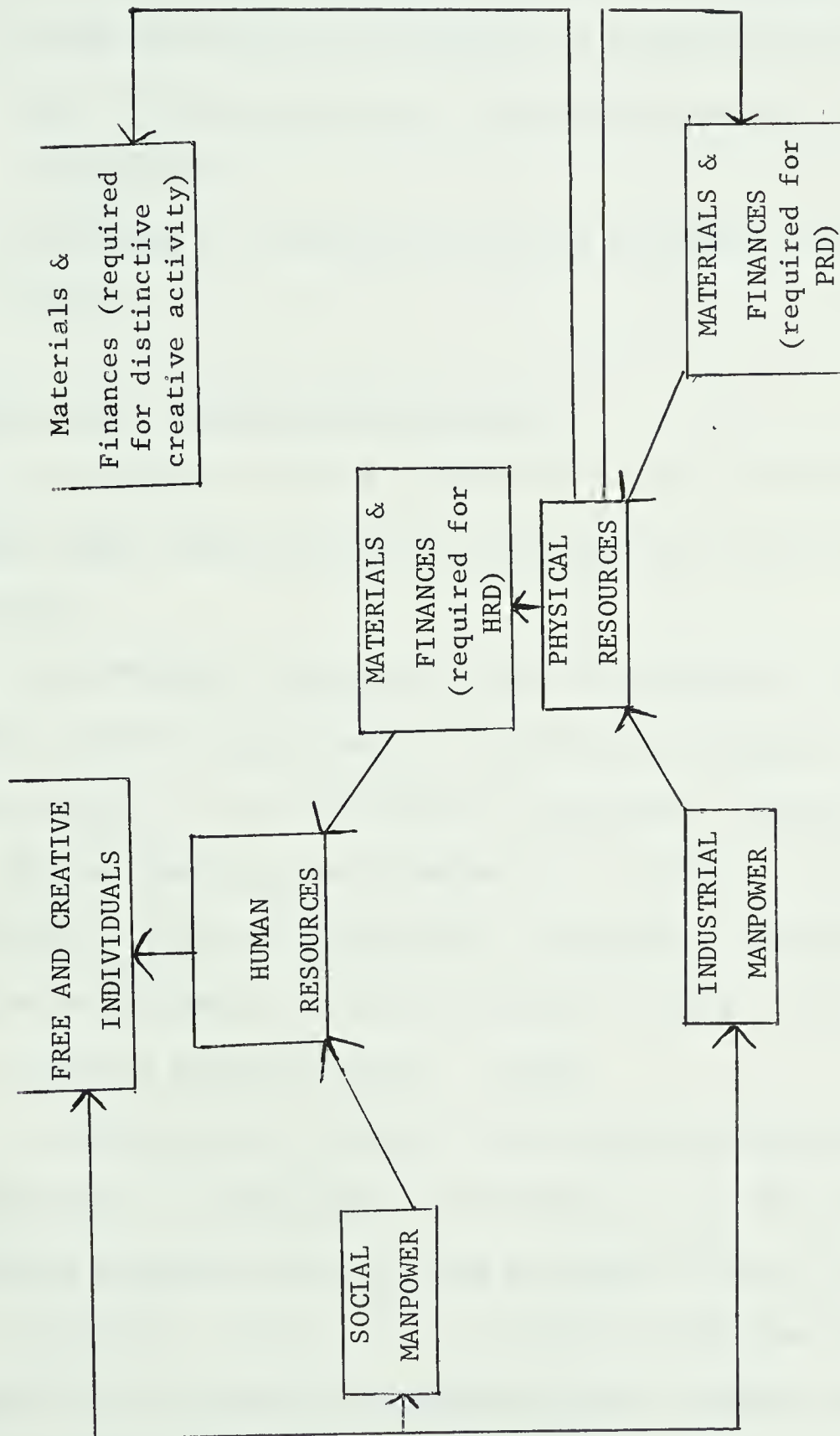
The dominant theme of the White Paper was the development of human and physical resources in a free enterprise society. While physical resources development concentrated on the development of such resources as oil, coal, and land, human resources development focused on the development of the abilities an individual possessed. Human resources development was facilitated through education, training, opportunities to put skills into use, maintenance of physical and mental health, and opportunities to develop wholesome values -- in short, to enable the individual to achieve his highest aspirations. (13:29-37) The development of the human and physical components were to proceed hand-in-hand so as to produce "A Society of Free and Creative Individuals". (13:34) (Figure 5)



FIGURE 5

TOTAL RESOURCES DEVELOPMENT (12:30)

A SOCIETY OF FREE AND CREATIVE INDIVIDUALS





The Premier identified the purposes of the White Paper as:

1. establishing basic principles which would serve to guide policy formulation,
2. establishing new concepts, policies, and programs,
3. bringing about a re-orientation of thinking which would meet the requirements and responsibilities of a new era of progress,
4. providing for coordination between Government programs.

(19:5)

#### The White Paper Outlines New Legislation

In addition to setting direction for future Government policy, the White Paper suggested means by which policy could be designed and implemented.

The Government was convinced that the programs -- both physical and human resources development -- could produce maximum benefits for Alberta society if they were better co-ordinated. Stress was to be placed not on developing new programs but on obtaining, 'Maximum effectiveness through the refinement, integration, coordination, and expansion of the many policies and programs already in operation or in the course of implementation.' (13:89)

To facilitate the required coordination the Government asked the Legislature to approve the establishment of the Human Resources Development Authority (H.R.D.A.) and an Alberta Advisory Council.

The H.R.D.A. was to , " . . . provide coordinated development and supervision of specific programs designed to develop human and physical resources in regions characterized by social and economic adjustment problems. (13:89)





The Alberta Advisory Council was to provide a feed-back service as to the effectiveness of Government programs and services. In addition, the Advisory Council was to, " . . . advise the Government on social and economic needs, and to submit recommendations for improving the effectiveness and quality of Government programs and services." (13:90)

The White Paper also committed the Government to a policy of increased research into human resources development. To this end the Government sought legislative approval of H.R.R.C. which would " . . . undertake educational, social, economic and other research relating to and affecting the development and conservation of human resources." (13:57)

To H.R.R.C. the White Paper assigned such specific tasks as:

1. devising " . . . better educational methods and programs for training manpower and for increasing the functionality of people engaged in human resources development." (13:74)
2. analyzing " . . . existing facilities and manpower employed in human resources development . . . ." (13:74) and
3. researching and improving upon educational curricula and teaching methods. (13:83)

The Honourable F.C. Colborne, Minister of Public Works, described the White Paper as a, " . . . blueprint for Human and Physical Resources Development . . . ." (7) Such a blueprint, he maintained, showed that if Alberta was prepared to coordinate the development of its physical and human resources, Alberta would be able to " . . . achieve an increased degree of excellence in social and economic development." (7)



## Bill 28 Receives Royal Assent

Third Reading. On March 29, 1967, the Committee of the Whole Assembly completed study of "Bill 28" and forwarded it to the Legislative Assembly for Third Reading. (17) Two aspects of the Committee's study of "Bill 28" are noteworthy.

First, the Committee did not alter the "Bill" in any way during the study.

Furthermore, examination of available records of the Committee proceedings indicates that only three questions were asked of the "Bill". The questions, which pertained to the number of meetings the H.R.R.C. was required to hold and its power to acquire and sell real property, were asked and answered in three minutes. (17)

On March 30, 1967, the Legislative Assembly heard Third Reading of the "Bill". The vote that followed unanimously approved the establishment of the Alberta Human Resources Research Council.

Royal Assent. On the same day the Lieutenant-Governor gave Royal Assent to the "Bill 28". (17) With Royal Assent given the Alberta Human Resources Research Council was born.

## IV. SUMMARY

In late October, 1966, Byrne and Schmidt began to write the legislation which would establish H.R.R.C. To a great extent H.R.R.C.'s draft legislation incorporated the proposals which Alberta educators had presented to the Government in December, 1965.

In November and December, 1966, many educational groups in Alberta, convinced that the Government was determined to proceed



with the establishment of H.R.R.C., mounted a campaign designed to place educational research in a position of top priority in H.R.R.C.

On February 9, 1967, the Government formally announced that it would ask the Legislative Assembly of Alberta to approve the establishment of H.R.R.C. During its seven weeks in the Legislature, "Bill 28" appears to have been the subject of little debate. Available records of the debate indicate that the M.L.A.'s envisioned that H.R.R.C. would devote much of its activity to educational research.

On March 30, 1967, the Lieutenant-Governor of Alberta gave his assent to "Bill 28" thus giving H.R.R.C. the statutory right to commence operation. The legislation directed H.R.R.C. to pursue a course of activity which would enable it to achieve the objectives of undertaking, " . . . educational, social, economic and other research relating to and affecting the development and conservation of human resources in Alberta . . . . " (14)





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## CHAPTER IV

### THE FIRST POLICIES OF THE ALBERTA HUMAN RESOURCES RESEARCH COUNCIL

#### I. INTRODUCTION

This chapter describes the events occurring between March 31, 1967 and August 31, 1968, which had a bearing on the development of the initial policies of H.R.R.C. To this end, events leading to the appointment of a director and a Council, and the establishment of policies related to H.R.R.C.'s objectives, organizational structure, financing, and relationships with external agencies are described.

#### II. THE SEARCH FOR A DIRECTOR

##### A Period of Inactivity

The granting of Royal Assent to "Bill 28" on March 30, 1967, appears not to have resulted in the immediate operationalization of H.R.R.C., indeed the first meeting of Council was not held until January, 1968. A number of events appear to be related to the lengthy period of inactivity.

The Premier. E.C. Manning was convinced that there was a need for H.R.R.C. to proceed slowly and deliberately with its operationalization. Commenting on the cautious approach he was advocating, Manning noted that a number of groups held expectations for H.R.R.C. and that these expectations were often conflicting. Manning also contended that a cautious approach was necessary for "Bill 28" was, "A broad enabling Bill deliberately lacking in detail." (17)





Consequently, there was a need for a thorough examination of the "Bill" in order to determine the implications H.R.R.C. held for Government and non-government research activities. (17)

An election. The proclamation of a provincial election for May 24, 1967, also contributed to the delay in operationalizing H.R.R.C. Manning maintained that the campaign prevented the Government from giving a great deal of attention to H.R.R.C. (17)

While the campaign disrupted the political climate of Alberta, the election results shocked the victorious Social Credit Party for the electorate of Edmonton-Strathcona voted against returning MacKinnon to the Legislative Assembly. Confronted with MacKinnon's failure to gain re-election, the Premier was forced to appoint a new Minister of Education. It was not until late June, 1967, that a new Minister was appointed. MacKinnon's defeat contributed to the delay in activating H.R.R.C. for it had been agreed in Cabinet that the Minister of Education would be the Chairman of H.R.R.C. (17)

Resistance. A growing resistance to H.R.R.C. on the part of a small number of Cabinet ministers also appears to have contributed to the lengthy period of inactivity. Many ministers apparently came to re-evaluate the impact that a quasi-independent government agency would have on their Departments. To a few ministers there came the realization that they had failed to recognize all of the implications that H.R.R.C. held for their Departments when it was being debated in Cabinet, thus they were not prepared to give their full support to H.R.R.C. (Anonymous.)



That there was some resistance to H.R.R.C. by some Cabinet members during the April, 1967 to January, 1969 period did not become public knowledge until April 17, 1969, when the ex-Minister of Public Welfare, A.J. Hooke, asserted that since the Social Credit Party had assumed office in 1935, all Government policies were, " . . . devised to help human beings and nobody else. I didn't see much difference in what had been done and what the Human Resources Research Council was designed to do." (3)

### The Search

The directorship -- a fundamental position. Perhaps the most significant factor in delaying the operationalization of H.R.R.C. was the search for its director. Not only did the Premier advocate a deliberate approach to operationalizing H.R.R.C. but he also stressed the need to search carefully before appointing a director. He stated, "We [the Cabinet] agreed that the director of the Council is fundamental -- you have got to get a good man." (17)

Byrne, in a letter to MacKinnon, also stressed the importance of the position of director.

On May 31, 1967, Byrne wrote:

The most significant factor in the development of the Human Resources Research Council is the selection of the director. It is he who must lead the Council in exploring those new frontiers for research and development to be opened through this organization; and his will be the responsibility of structuring the organization and selecting the staff to achieve its purposes. Furthermore, he will have the task of interpreting these purposes to a wide variety of publics. (4)

Criteria for selection. In addition to stressing the significance of the position of director, Byrne proposed several criteria



which could act as guidelines in the search for the director.

The director, Byrne suggested, should possess:

1. An intimate knowledge of social science and educational research procedures.
2. Experience in a social science or educational research institute.
3. Appreciation of the contributions that can be made by social science research.
4. Skills of a diplomat which would enable him to establish and maintain harmonious relationships with scholars, politicians, and professional groups.
5. Creative ability.
6. Sensitivity to the human implications of social science research. (4)

Byrne also wrote:

To allay the fears of that section of the community interested in public education, it might be desirable to secure an educator with a research background. This type of appointment is not viewed as essential. A director must be sensitive to and sympathetic towards needs for research and development in education. He might, however, be a social scientist who views education as a central process in developing human resources. (4)

A Selection Committee. In late June, 1967, a Selection Committee was appointed to secure the services of a director. The Committee members were:

1. The Honourable A.R. Patrick, Chairman, and Minister of Industry and Development, and Chairman of the Alberta Research Council,
2. Dr. T.C. Byrne, Deputy Minister of Education,





3. Dr. W.H. Johns, President of the University of Alberta,
  4. Dr. K. Wiggins, Director of the Alberta Research Council, and
  5. Mr. J. Ife, Personnel Planning Director, Government of Alberta.
- (6, 15, 21)

The Committee meets. In July, 1967, the Selection Committee met to establish procedures to be used in the search. The Committee also approved a "man specification" which had been developed by Ife. The "man specification", Ife asserted, utilized many of the ideas which Byrne had communicated to MacKinnon in the letter of May 31, 1967. (15)

The "specification" suggests that the Committee was prepared to give preference to the appointment of an educator, for it stated, "The initial emphasis [of H.R.R.C.] will be given to education . . . ." (12) A Committee member recalled that the Committee was made cognizant of the pressures being exerted by Alberta educators to appoint an educator as director and that educational research was to be an important activity of H.R.R.C. (21)

The Committee decided to place advertisements for the position of director in Canadian, American and British publications. At the same time the Committee mounted a campaign of contacting personal acquaintances for recommendations. (15)

Applications. As a result of the advertising and personal contact campaigns twenty-nine individuals applied for the position of director. Of these applicants, more than fifty percent had extensive training and experience in education. After reviewing the



applications the Committee selected three of four individuals to be interviewed, but these were found to be unacceptable.<sup>5</sup> (6, 15, 21)

A conference. On October 7-9, 1967, Byrne attended a "Symposium on Social Policy: Local Control of Education" which had been organized by Dr. I.E. Housego of the University of British Columbia. One of the attendees of the "Symposium" was Dr. L.W. Downey, Chairman -- Centre for the Study of Administration in Education, University of British Columbia.

One evening Byrne, Downey, and some other friends met to renew old acquaintances.<sup>6</sup> During the course of the evening the discussion came to focus on H.R.R.C. Later that evening, after the group had dispersed, Downey contacted Byrne so that they might discuss the position of director. The discussion concluded with Downey expressing some interest in the position but making no commitment. (6, 11)

Downey applies. On October 13, 1967, Downey wrote Byrne asking for a copy of the White Paper and how he might apply for the position of director. (8) In late October, 1967, Downey formally

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<sup>5</sup> The Committee members declined to identify the applicants who were interviewed and declined to elaborate as to why those interviewed were unacceptable.

<sup>6</sup> Byrne and Downey had been personal friends for a number of years. In addition, Downey had taught at the University of Alberta for a number of years prior to his acceptance of a position at the University of British Columbia in 1967.



declared his interest in the position. (11) The Committee, impressed with his credentials, asked Downey to appear for an interview in Edmonton on November 14 and 15, 1967. (6, 11, 15)

A letter of recommendation. On November 30, 1967, Byrne wrote Patrick and offered to recommend Downey for the position of director. Byrne noted as factors favoring Downey's appointment:

1. his training in education and experience in educational research;
2. his writings on organizational theory;
3. his comprehensive preparation in the social sciences;
4. his " . . . tremendously creative mind;" and
5. his demonstrated ability to lead and inspire others. (5)

The search ends. On December 4, 1967, the Selection Committee, after a unanimous vote, submitted a recommendation to the Executive Council that Downey be appointed director of H.R.R.C. (15) The Executive Council accepted the recommendation and submitted an offer to Downey. Downey's acceptance of the position on December 18, 1967, was announced publicly on December 21, 1967. (15)

### The Council

Chapter 36. The legislation establishing H.R.R.C. created a three-level organizational structure -- a Council, a director, and a number of staff who were to carry out the research programs. (13) Noting that such a structure had proven successful with the Alberta Research Council, E.C. Manning asserted that a Council had, " . . . the advantage of combining government with the private sector . . .





I don't think these things should be a committee of Cabinet that has only the government viewpoint as to what is going to be researched." (17)

In establishing a ten-member Council, the legislation directed that two of the councillors were to be members of the Cabinet, of which one was to be the Chairman, and one councillor was to be the director. The seven other councillors could be drawn from the public at large. (13)

Appointments. On October 17, 1967, the Government appointed seven individuals to the Council. (19) These were:

- |                       |  |
|-----------------------|--|
| 1. Mr. R. Reiersen    | Minister of Education                            |
| 2. Mr. A.O. Aalborg   | Provincial Treasurer                             |
| 3. Dr. T.C. Byrne     | Deputy Minister of Education                     |
| 4. Dr. W.H. Johns     | President, University of Alberta                 |
| 5. Dr. W.C. MacKenzie | Dean, Faculty of Medicine, University of Alberta |
| 6. Dr. H.G. Bliss     | Vice-President, University of Calgary            |
| 7. Dr. G.L. Burton    | Rancher and Economist.                           |

On November 28, 1967, Dr. B.T. Keeler, President of the A.T.A. was appointed to the Council. (20)

### III. OPERATIONALIZATION: JANUARY, 1968 - AUGUST, 1968

#### The First Meeting of Council

The Chairman's opening statement. On January 12, 1968 the Council held its first meeting. The Chairman of the Council, the



Honourable R. Reiersen, noted that the meeting was called so that Council might begin to define its objectives and examine its task.

(1)

Affirming that H.R.R.C. was in a position to make a major contribution to the advancement of human affairs, Reiersen went on to caution that:

. . . we must not be caught up in the whirl of doing research merely because it is the fashionable thing to do. Nor should we do research only for the sake of doing research. There will be no end of legitimate problems to examine, and there will be no need to redo or to duplicate the efforts of other institutes, agencies or individuals whose findings we may use and apply in our own situation. (1)

He concluded his opening remarks by expressing his belief that the first year of operation should be one of orientation, examining possible research activities and establishing priorities.

(1)

Downey's presentation. Downey suggested that there were two basic problems confronting H.R.R.C. -- operationalization and determining what research was required to develop Alberta's human resources. Of these, Downey contended, operationalization was of immediate concern. Effective operationalization, however, was dependent upon Council being able to define goals, recruit staff, procure work space, and establish management procedures. (1)

Identifying the task of defining goals as being prerequisite to the operationalization of H.R.R.C., Downey proposed four activities in which the Council might engage and from which guidance might be obtained as Council sought to define its goals. These activities were:



1. establishing contact with various Alberta policy-making bodies;
2. conducting a modest number of survey studies to ascertain the existing social conditions in Alberta;
3. developing a social inventory; and
4. inviting people familiar with the social needs of Alberta to a seminar. (1)

The Council members tender their views. Following the first portion of Downey's presentation the Council debated his suggestions. While one councillor contended that the hearings with the policy-making bodies would expose H.R.R.C. to a vast array of expectations thus creating problems in establishing priorities, a second councillor asserted that the hearings would enable H.R.R.C. to become aware of the expectations that were held for it and, at the same time, these bodies would become aware of H.R.R.C.

The Minutes of the meeting noted that Aalborg, one of the Cabinet's representatives on the Council:

" . . . conceded that the defining of goals was a basic matter but that the Council should be careful not to assume that it was intended to lead a completely independent existence, an existence, moreover, that it could define in its own terms," (1)

Aalborg continued by remarking that H.R.R.C.'s functions must be examined in view of the functions of the H.R.D.A. and the Alberta Advisory Council. Aalborg further suggested that H.R.R.C. should refrain from, " . . . going on 'extended fishing expeditions' as to what it should do . . . there was a greater need to get on with some definite, concrete projects," (1)





Referring to H.R.R.C.'s relationship with the H.R.D.A. and the Alberta Advisory Council, Reiersen was reported as asserting that although these bodies could refer problems needing research to the H.R.R.C., "H.R.R.C. is not entirely responsive, . . . [H.R.R.C.] can initiate studies in areas where it sees the need." (1)

The discussion came to an end with Byrne suggesting three general activities for H.R.R.C.:

1. Identify social issues, trends and changes;
2. Determine the effect of these changes on a particular institution . . . and its need to adapt to these changes;
3. Study the inter-relationships among these institutions. (1)

Downey continues. With the discussion of the goals of H.R.R.C. concluded, Downey proceeded to outline his ideas regarding staffing. Downey envisioned that H.R.R.C. might employ four kinds of personnel. First, there would be a core staff of six individuals whose primary function would be to, " . . . evaluate research proposals and to co-ordinate the work of the Council." (1) Downey also suggested that the staff would include consultants, who would be employed on an ad hoc basis; research technicians; and contract researchers who would be recruited to do a particular study and released when the study was completed. (1)

Upon Downey's suggestion that the recruiting of staff begin immediately, the Council appointed an Advisory Committee of Byrne and Johns who were to work with Downey in selecting the core staff. (1)



Closing comments. Prior to adjournment the Chairman asked each councillor to summarize his impressions of what the Council might do. Of the comments that followed, those of Byrne appear to reflect most clearly the beliefs of the councillors as to the future role of the Council. The Minutes of the meeting reported Byrne's closing statement as:

. . . although the Council might define goals in broad, general terms, the people in the organization will ultimately determine what will be done. The best that the Council can do . . . was to ensure that flexibility was built into the organization, and that a number of points of view were represented. (1)

### Strategy Papers

Following the Council meeting Downey returned to Vancouver whereupon he began writing a series of "Strategy Papers" which, he stated, reflected his " . . . preliminary thoughts and concerns . . . ." on H.R.R.C. (9)

"Strategy Paper #1". In this "Paper" Downey suggested four tasks in which the Council might engage until May 1, 1968, when he would assume the position of director on a full-time basis. These tasks were:

1. The development of staffing policies and procedures and the recruitment of an initial staff.
2. Assessments of data in storage, or research in progress and of perceived needs.
3. The creation of a headquarters -- space and equipment.
4. The clarification of concepts and policies related to the nature and scope of the Council's task. (9)



Downey contended that these tasks were in need of immediate attention because he had been bombarded with requests for meetings and suggestions for research projects by a number of Alberta groups. While conceding that such expressions of interest were encouraging and that the Council should nurture this interest, Downey wrote:

Just now, however, this situation is perceived as a difficulty -- inasmuch as the Council's staff may be expected to be in command of certain information, to express positions and policies, and to engage in specific activities, before it has had any time to plan, to organize, to staff, or to set directions. (9)

"Strategy Paper #2". Here Downey reiterated the ideas on staffing which he had presented to Council on January 12, 1968. He envisioned a small core staff of permanent planners and researchers drawn from the major social science disciplines whose work would be complemented by consultants employed on a part-time basis. (9)

"Strategy Paper #3". In this "Paper" Downey argued for the need for establishing inventories of available data, work in progress, and areas where research was needed. He wrote:

. . . it would seem important that, before any serious policy-making or project-planning occurs, certain kinds of inventories be taken to provide us with a kind of 'reading' on what has been done, and what might be done in connection with the broad field of human resources development in Alberta. (9)

To create such inventories Downey suggested that the Council employ an individual who would collate existing data and conduct a survey of research in progress. In addition, Downey proposed that he would establish contacts with Alberta policy-makers and scholars in order that the Council would be made aware of research needs. Downey envisioned that the inventories would be completed by June, 1968. (9)





"Strategy Paper #5". Entitled "Policies -- The Scope of the Council's Concerns; Its Early Priorities; Its Concept of Research and Development," this "Paper" outlined Downey's attempt to "come to grips" with the concept of human resources and the implications that it held for the functions of the Council. He wrote:

As one attempts to take hold of the concept 'human resources', one is forced to consider a number of questions: (1) What are the dimensions of human potentiality? (2) Through what activities are human potentialities developed? (3) What agencies in society have as their purpose the development of human potential? (4) How successful are these agencies? (9)

Downey noted that solutions to the questions were not easy to find, for man's potential consisted of a number of components which were developed differentially among men. If the thesis that men develop their potentialities differentially was accepted, then, Downey wrote, " . . . our problem has no limits; it involves the whole of society and all individuals in it." (9)

Refraining from suggesting policies which might embrace the questions he had asked, Downey proposed that he visit various research and development centers in the United States so that he might determine their tasks and functions. He also suggested that the Council employ part-time consultants who would meet with the Council and staff in a seminar retreat for the purpose of aiding H.R.R.C. in conceptualizing its task. (9)

#### Recruitment of Professional Staff

A Consideration. When asked what characteristics he was looking for in potential staff members, Downey remarked:

What I really wanted was people who could conceptualize a



research domain and who then could take the next step to design and carve it up. Hence I was really looking for research administrators, research conceptualizers; but I wanted, as far as possible, representatives of a number of perspectives. (11)

With this consideration in mind, Downey set about the task of recruiting staff with what he described as, "A purely seat of the pants, intuitive approach to people who I knew or knew of." (11)

Dr. I. Housego. The first person recruited by Downey was Dr. Ian Housego, who was a professor in Downey's department at the University of British Columbia. Housego had earned his doctorate in educational administration from the University of Alberta in 1964 and taught at the University of Saskatchewan before moving to British Columbia in 1967. His special interests included social policy development and administration. (14)

When asked why he accepted a position on staff, Housego replied that his university experience convinced him he was capable of doing a satisfactory job of teaching but that he was not, " . . . cut out to be a researcher as such." (14) Housego also stated:

The kind of experience that I wanted but did not have, was administrative experience and Lorne [Downey] promised that in this organization that was the kind of experience I could have along with research experience. (14)

In mid-February, 1968, Housego visited Edmonton, was interviewed by Byrne, Johns, and MacKenzie, and was offered a position as Associate Research Officer. In June, 1968, the Council formally approved his appointment. (2)



Dr. R.G. McIntosh. The second staff member recruited was Dr. R.G. McIntosh who was brought to Downey's attention by Housego in February, 1968. Housego and McIntosh had been Assistant Professors at the University of Saskatchewan in 1964. In 1965, McIntosh left Saskatchewan to pursue doctoral studies in educational administration, with a focus on curriculum and teacher education, at Harvard. (18)

On February 9, 1968, Housego wrote McIntosh and asked if he would be interested in securing a position with H.R.R.C. (14) On February 17, 1968, McIntosh wrote a letter of application to Downey. (18) In March, 1968, McIntosh visited Edmonton where he was interviewed by Byrne and Johns and offered a position as Associate Research Officer. (18) In June, 1968, Council confirmed the appointment. (2)

Mrs. A.M. Decore. Mrs. Decore, a doctoral candidate in the Department of Sociology, University of Alberta, was the third staff member recruited. Decore, who was a personal friend of Erick Schmidt and Preston Manning since her undergraduate years, had heard from Schmidt that Downey was recruiting staff. Her letter of application to Downey was followed by an interview in April, 1968, whereupon she was offered a position as Assistant Research Officer. (7) Confirmation of her appointment came at the Council meeting in June, 1968. (2)

Consultants. At the same time that the search for the core staff was underway, Downey sought out the services of Dr. F. Chase





and Dr. C. Benson as consultants employed on a part-time basis. Chase, under whom Downey had completed his doctoral studies, had directed a study of American educational laboratories and research and development centers from 1966 to 1968. By late July, 1968, Chase had accepted Downey's invitation to serve as Consultant. With respect to Benson, an American economist, Downey was unable to complete negotiations, for Benson had accepted a position in Pakistan. (11)

#### A Conflict

When Downey accepted the position of director he was cognizant of the fact that he was responsible to the Council but, " I assumed that I had a fairly free hand." (11) In late April, 1968, Downey left Canada for a three week lecture tour of Great Britain. Upon his return to Edmonton, he was informed by Reiersen that only three staff members were to be recruited, not the six or more that Downey had originally sought. (11)

Reactions as to why Reiersen pursued such a course of action were varied -- one respondent attributed it to Reiersen's questioning of Downey's expense accounts while Downey attributed it to personal matters. (6, 11) Unfortunately, Reiersen was unavailable for comment.

Although he contemplated resigning the directorship at this point, Downey set about trying to make the best of the situation he now found himself in, however the situation continued to deteriorate. Downey stated that:



. . . communication between Mr. Reiersen and myself broke down, in fact, there was none for a period of time, so we were in a 'limbo' as far as our relationships with government were concerned. I simply didn't know what what was going on. (11)

### The Second Council Meeting

On June 10, 1968 the second meeting of Council was held in Edmonton. The purposes of the meeting were to establish policy and to examine possible research activities. (2)

### Policies

Relationships with other agencies. Downey reported that since his appointment as director he had been beseiged with numerous requests from various Alberta agencies, " . . . to discuss the philosophy, the aims and the early priorities of the Council." (2) Commenting on this period, Downey noted that expectations for the Council were diverse and often conflicting. Consequently when he met with various groups:

. . . I would listen very courteously, but without exception and, in fact, as a matter of policy no was the automatic word. I would say, 'We cannot be responsive to every demand, we are not a funding agency, so the answer is automatically no to your request, however, I'll feed your idea into our deliberations.' This was done very deliberately and with the approval of the Council because we wanted to become known as a Council that was going to do its own thing. (11)

The question of the Council's relationships with Departments of government, H.R.D.A., and the Alberta Advisory Council was also debated. Mr. H. Strom, Chairman of H.R.D.A., was in attendance and was asked to comment on the relationships between H.R.R.C. and H.R.D.A. He noted, " . . . that the H.R.R.C. can provide a research service for the Authority -- because the Authority is concerned with development, action programs, not research." (2)



Downey then proceeded to diagram his conception of the relationships between H.R.R.C., the Government, H.R.D.A., and the Alberta Advisory Council. (Figure 6) The Council agreed that Downey's ideas were, " . . . a reasonable posture for the Council to adopt." (2)

Downey also reported that in his discussion with Government Departments the question of confidential studies had been raised. His discussions lead him to believe that various Departments were reluctant to approach the Council with research requests which were of a confidential nature, rather the Departments preferred to initiate and sponsor research projects on their initiative. (10)

Downey originally felt that the Council should refrain from conducting confidential studies, however, by late May, 1968, Downey had taken the view that:

. . . although the legislation establishing the Human Resources Research Council is such as to remove it from the immediate direction of any particular department of government, the fact remains that the Council will operate " at the pleasure" of the government and hence must be very much in tune with the needs and wishes of government.

Now, given this general orientation, I would see no reason why the Council could not or should not conduct studies which are confidential in nature. (10)

Downey presented his ideas to the Council which, after some debate, " . . . agreed that this view should become policy." (2)

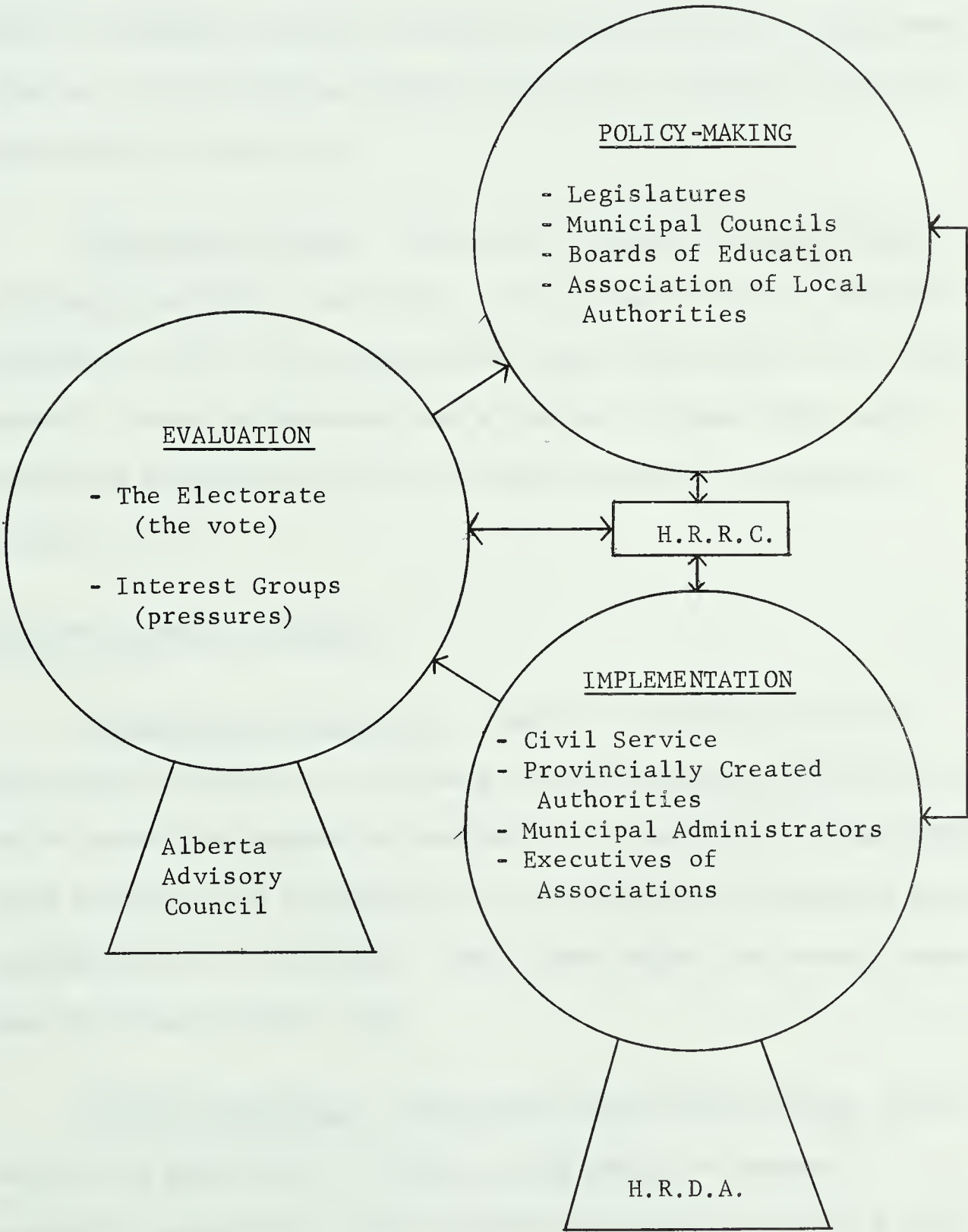
The Council also agreed that H.R.R.C. should explore the possibilities of obtaining funds from federal government agencies. (2)

Intra-mural research. The Council, upon the suggestion of councillor MacKenzie, adopted as a major policy statement:





FIGURE 6  
PROCESS OF GOVERNMENT AND SOCIAL POLICY  
DEVELOPMENT (2)





. . . this Council's main objectives should be intra-mural research, but that extra-mural research might be supported, on occasion, when the proposed research relates to the Council's current objectives and activities. (2)

The policy suggested that H.R.R.C. funds were to be used primarily to support research endeavours directly related to H.R.R.C. designed projects. Only limited and occasional support was to be given to research projects designed and carried out by independent scholars. Such projects, however, were to be related to H.R.R.C. objectives and activities.

Personnel policies. The Council approved the appointments of Housego, McIntosh, and Decore to the permanent staff, effective September 1, 1968. The Council also moved the adoption of a salary schedule, travel allowances, and a system of grants which would compensate members of staff for expenses incurred in moving to Edmonton. (2)

#### Proposed Research Projects

Educational Forecasting. Downey's discussions with the Department of Education, the Board of Post-Secondary Education, and the Universities Commission resulted in his proposing a study which would determine the feasibility of establishing a coordinated forecasting service in education. After some debate the Council moved that the study proceed. (2)

Social Accounting. Discussions with various groups, particularly the Department of Welfare, lead Downey to propose a feasibility study which would examine the possible role of H.R.R.C.



in developing measures of the quality of life in a society. The Council moved that the study be undertaken. (2)

Education. Noting that, "The expectations that professional educators hold for the Human Resources Research Council appear to be very diverse and somewhat conflicting." Downey proposed that Council appoint a number of educators to an Advisory Committee. (2) The Committee would inform the staff of Alberta's educational research needs while H.R.R.C. would have the opportunity to elaborate on its role. The Council approved of the suggestion. (2)

#### The Summer of 1968

The months of July and August, 1968, saw little activity by H.R.R.C. This state of affairs resulted from the inability of the staff to meet until September, 1968. Housego was committed to teaching summer school at the University of British Columbia, McIntosh and Decore were finishing the writing of their doctoral dissertations, and Chase was unable to come to Edmonton until late-August. (7, 11, 14, 18)

During this period, however, there was some activity. Downey was conducting exploratory discussions with various Government Departments. These discussions were disrupted from August 6-14, 1968, when Downey went to Paris as a member of the Canadian delegation to the U.N.E.S.C.O. International Conference on Educational Planning. (11) Also, during this period, the status studies and surveys that Downey had suggested at the January Council meeting were being completed by Mr. J. Gishler, a graduate student in economics. (11)





## IV. SUMMARY

The granting of Royal Assent to "Bill 28" on March 30, 1967, was not followed by the immediate operationalization of H.R.R.C. The Premier's conviction that a cautious approach to operationalization was in order, the election of May, 1967, and resistance to H.R.R.C. on the part of some members of Cabinet appear to have been factors of some import in delaying the operationalization of H.R.R.C. Other factors contributing to the delay included: (1) a six month search for a director; (2) no appointments to Council until October, 1967; (3) the commitment of Council in January, 1968, to Byrne's idea that, " . . . although the Council might define goals in broad, general terms, the people in the organization will ultimately determine what will be done." (1); (4) the inability of the director to assume his duties on a full-time basis until May, 1968; and (5) the commitments of the recruited staff to other endeavours until late-August, 1968.

The period April, 1967 to August, 1968 was not characterized by total H.R.R.C. inactivity. Downey had met with a number of groups and had become aware of the vast range of expectations which were being held for H.R.R.C.

At the June 10 meeting of Council, a number of tentative but rather fundamental policies were discussed. Among these were the following:

1. that H.R.R.C. should be primarily an in-house research agency;
2. that H.R.R.C. should be particularly sensitive to the research needs and interests of Government Departments and agencies;
3. that the role of H.R.R.C. should be to inform social policy;



4. that H.R.R.C. should be essentially an open agency -- but might, on occasion, undertake confidential studies;
5. that H.R.R.C. should establish a system of payments to staff for expenses incurred in moving to Edmonton and while travelling on H.R.R.C. business.



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## CHAPTER V

### POLICY MODIFICATION

#### I. INTRODUCTION

This chapter describes the events of September 1, 1968 to January 16, 1969, which lead to the modification of policies existent prior to September 1, 1968. As in Chapter IV the foci of this chapter will be H.R.R.C.'s objectives, organizational structure, financing, and relationships with external agencies.

#### II. OBJECTIVES OF THE HUMAN RESOURCES RESEARCH COUNCIL

##### The First Meeting of Staff

While the activities of the Council and Downey during the January to August, 1968 period had operationalized H.R.R.C., this operationalization was of a preliminary nature. Council had established a few policies and had approved a small number of feasibility studies. Downey's activities during this period were primarily concerned with recruiting staff and entering into discussions with a number of Departments of Government. During this period, however, a plan of action had not been developed, rather the creation of such a plan had been delegated to the staff. The task of developing a plan of action commenced on September 3, 1968, when Downey, Housego, McIntosh, Decore, Chase, two Research Technicians, and two secretaries met in an office in the Government Administration Building in Edmonton. (28)



At the meeting Downey informed the staff that the first few months of activity would be devoted to planning. He went on to note that while a planning period was requisite to the establishment of direction, research programs would have to be prepared early in the planning period for Council was scheduled to meet on November 1, 1968, and the Government required that budget estimates be submitted by November. Thus, Downey argued, an elaborate planning period was not possible and there was a need to place some rigor on the planning period. (28)

#### Five Phase Planning Process

By September 6, 1968, the staff had created a blueprint for the planning period. (3) Consisting of seven task areas the blueprint was later refined into what came to be known as the Five Phase Planning Process. (27:1) Figure 7 is a schematic illustration of the Five Phase Planning Process that the staff of H.R.R.C. adopted in early September, 1968.

Although Figure 7 suggests a series of discrete phases for the planning process, in practice the phases over-lapped to such an extent that they were not readily distinguishable from each other. A number of factors, which will be described in detail throughout this chapter, appear to be related to the over-lapping of phases.

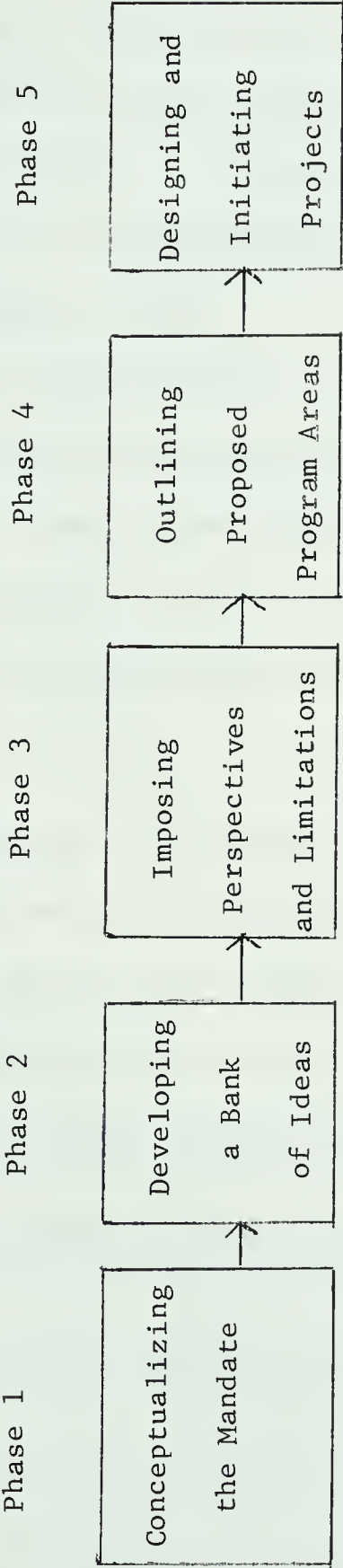
#### Phase 1: Objectives are Developed

The development of objectives for H.R.R.C. was the major focus of staff activity during Phase 1. To this end the staff addressed themselves to the tasks of examining and interpreting the legislation



FIGURE 7

H.R.R.C. FIVE PHASE PLANNING PROCESS (27:1)







establishing H.R.R.C. and the White Paper, conceptualizing the task of H.R.R.C. and identifying the components of the task. (4)

During this Phase the staff engaged in what Decore described as a series of "group-think" sessions. (14) Individual staff members would examine the legislation and the White Paper and bring their interpretations to a meeting of the whole staff where a discussion would occur. From these sessions, objectives were gradually developed and documented. (14)

The objectives also appear to have developed from staff discussions of the feasibility studies which Council had approved in June, 1968. One of the concerns of the staff during the discussions was the question, "Is there an appropriate role for us?" (3:1) The answer to the question appeared to be dependent upon the establishment of objectives.

Meetings. As a result of the activities associated with Phase 1, the staff was able to document a series of objectives by September 17, 1968. On that date Downey informed a group of University of Alberta social scientists that the objectives of H.R.R.C. were:

1. To conduct or sponsor basic research designed to fill gaps in existing knowledge in appropriate domains.
2. To codify, interpret and disseminate available knowledge for use by policy-makers and others.
3. To develop plans and materials for use by agencies concerned with human resources development, deployment and conservation.
4. To promote and facilitate appropriate programs of change in education and related areas.
5. To encourage and cooperate in the training of researchers and developers in appropriate areas.



6. To assist all citizens (particularly administration and policy-makers) to understand emergency trends and problems in the area of human resources development and use. (4)

On September 30, 1968, Downey, in a speech to the Ad Hoc Advisory Panel on Research and Development in Education, reiterated the objectives which he had presented to the social scientists. (5)

On October 7, 1968, Downey met with the Cabinet for the purpose of discussing the activities of staff during the month of September. He elaborated on the objectives which had been presented at the September 17, 1968, meeting with the social scientists. He stated:

Though research . . . can and should influence policy and planning, the two functions ought to be kept separate; we view our role, therefore, as the informing of policy and planning -- not planning itself. (18:3)

In a speech to the Preventive Social Service Seminar in Edmonton in November, 1968, Downey asserted that the conduct of predictive, evaluative, fundamental, applied, and monitoring types of research and the informing of social policy were the " . . . raison d'etre of the Human Resources Research Council." (24:7)

The Prospectus. On December 4, 1968, the staff completed, " . . . a summary of the products of the preliminary planning by staff." which they entitled, Prospectus 1969-1970. (6:iii) The Prospectus documented the objectives of H.R.R.C. as:

1. the conduct, or sponsorship, of basic research designed to fill gaps in existing knowledge in appropriate domains;
2. the collection, codification, interpretation and dissemination of available knowledge for use by policy-makers and others;
3. the development of plans, materials and processes for use by practitioners in fields related to human resources development or conservation;



4. the design and monitoring of programs of change;
5. the encouragement and support of training programs for researchers and developers in appropriate areas; and
6. the informing of all citizens of emerging trends and problems in the area of human resources development and conservation.  
(6:5)

In summary, the objectives of H.R.R.C., as interpreted by the staff, appear to have been documented by mid-September, 1968, but were continually refined until early-December when they were incorporated into the Prospectus.

### III. A PROGRAM OF RESEARCH

As the objectives were being developed consideration was also being given by the staff as to the means by which the objectives could be incorporated into a program of research. The development of a program of research grew out of the activities of the staff during phases 2, 3, 4, and 5 of the planning process.

#### Phase 2

When the staff met in early September they decided that they would encourage external agencies to submit proposals for research. The staff also decided to seek invitations from external agencies so that research ideas might be discussed. McIntosh stated that as a result of these decisions:

We were bombarded with random stimuli. Nothing ever seemed to add up to a pattern. There were just hundreds and hundreds of ideas, most of which, from my perspective, were not of enduring value. They were a response to somebody's day-to-day hang-up.  
(40)

Ideas for research such as pre-school education, factors affecting the choice of teaching as a career, Indian education,





adult education, and an inventory of the nature of man were received from the external agencies and incorporated into the "bank of ideas". (10, 31, 5, 4)

The "bank" also incorporated a number of research requests that were received prior to the first meeting of staff as well as the feasibility studies approved at the June Council meeting. (44, 45, 46, 2)

The staff contributed to the "bank" with suggestions for studies of the rural high school, educational opportunity, individuality, data systems, and research organizations. (14, 28, 34, 35, 40)

### Phase 3

In late-October the staff turned their attention to Phase 3 which was an attempt, " . . . to order these issues and ideas and to impose certain kinds of perspectives." (4:2) That is, the staff examined the research ideas that had been received and then attempted to establish research priorities.

A memorandum. On October 21, 1968, Downey, in a memorandum to the staff, wrote:

As I look back over the activities of the past six weeks . . . I conclude that significant progress has been made, and a high degree of consensus achieved, in all matters except one -- namely, the establishment of criteria for the selection of program areas and/or projects.

. . . I consider it important for us to pay some systematic attention to the issue now; to attempt to bring to the level of consciousness those considerations or guidelines that may be operative as we discuss proposals . . . (19)

Criteria. The imposing of perspectives during Phase 3 lead the staff to examine such criteria as:



1. Pay-off -- long-term vs. short-term,
2. Expectation of others vs. Interests of staff,
3. Degree of risk vs. Anticipated significance,
4. Delicacy of Area vs. Boldness of Idea,
5. Independence of H.R.R.C. vs. Need for Collaboration,
6. Breadth vs. Depth of endeavours,
7. Precedents for activities vs. Freshness of ideas. (19)

The staff agreed that a major consideration in the selection of research projects was the interests and preferences of staff members. The staff also agreed that research projects were selected which would reinforce and build on other projects. An attempt was also made to select projects which would provide both short-term and long-term visibility for H.R.R.C. Downey's view that H.R.R.C. should supplement the educational research capability of Alberta and that H.R.R.C. should possess a small in-house capability lead the staff to give consideration to projects which could be undertaken in collaboration with out-of-house researchers.<sup>7</sup>

The staff also agreed that while the informing of social policy was the raison d'etre of H.R.R.C. considerable attention was given to the question of studies that might be critical of or hostile toward

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<sup>7</sup>A search, by the investigator, failed to reveal the existence of a documentary record of the criteria for selecting research projects, consequently the staff were asked to estimate the criteria that were developed.



Government policy. The comments of the staff indicated, however, that the matter has not been fully resolved. In the October 21, 1968, edition of the Edmonton Journal Downey was reported as stating, "We are completely free from the Government. It is conceivable we can examine things the Government doesn't want us to." (12) In an interview in May, 1969, Downey conceded that the staff had respected the wishes of Cabinet on at least one occasion. (28) In the main, the staff modified Downey's assertion of October 21. McIntosh's comments were typical of those of the staff. He stated:

I don't think we are going to shy away from studies which may be critical of Government, but I think we are going to shy away from any kind of activity which could be interpreted as hostile towards the Government. (40)

#### Phase 4

As was the apparent case with the other phases, Phase 4, the outlining of proposed program areas, appears not to have been a discrete unit of activity. Despite the over-lapping of phases, the major work on Phase 4 appears to have been done in late-October and November.

September 5, 1968. On September 5, 1968, Downey submitted a number of proposed research projects, which had been approved by the Council in June and which had been discussed among the staff, to Reiersen. Included in the submission were the following projects:

1. Educational Planning. A study which would explore the feasibility of establishing an educational forecasting service which would aid in, " . . . the planning of educational facilities and services and the allocation of scarce resources





to education." (17:2) While the Educational Planning project was to be a long-term venture, three shorter-term projects were proposed in the area of Educational Planning.

- a. A study of the needs and services of continuing education in Alberta.
  - b. A study of the training, deployment and utilization of social service personnel in Alberta.
  - c. A study of family life education in Alberta.
2. Social Accounting. This study would explore, " . . . the feasibility of developing a set of 'social indicators' which will enable us to monitor the effects of various social policies and programs." The staff also proposed three smaller projects:
- a. A number of evaluative studies of the programs of the Department of Welfare.
  - b. A study of programs and services provided for exceptional persons in Alberta.
  - c. A study of the re-education, re-deployment, and utilization of the talents of the aged in Alberta.
3. Educational Research.
- a. A study of flexible school buildings.
  - b. A feasibility study of, " . . . clinical modes of training -- both for professional practitioners and for researchers . . . ." (17:3)
4. Manpower. Feasibility studies " . . . in the use of computers and other technological devices in retraining personnel." (17:4)



5. Youth. A study of, " . . . the factors underlying the so-called 'increasing restlessness of youth'." (17:4)
6. Problems of the City. Studies of future conditions in Alberta cities.

A new staff member. That there was staff activity in Phase 4 prior to late-October is suggested by the appointment of Mr. J. Hudson to the position of part-time Research Technician in late September, 1968. In order that they might obtain information as to how a research center might be organized, the staff decided to initiate a library study of research organizations in North America. To this end, Hudson's services were acquired. (35)

October 7, 1968. At his meeting with the Cabinet on October 7, 1968, Downey noted that the list of projects which had been forwarded to Reiersen in early September, " . . . were largely in the nature of 'pet ideas'; they were quite fragmentary; and they did not reflect careful conceptualization or planning." (18) He went on to note that:

These tentative guidelines have prompted us to re-examine some of our earlier postures and proposed projects. As a result we are developing a series of alternative proposals for presentation to our Council in early November. (18:3)

Downey's comments at the Cabinet meeting also suggest that the outlining of program areas had been given some attention by the staff prior to late-October.

Proposals. During the period of late-October to mid-November the staff commenced writing a number of proposals which could be utilized in developing a program of research. Downey stated, that the



typical strategy employed in the writing of the proposals was, " . . . the individual would prepare some working notes and present them to the group. We would have a discussion and then he would prepare a paper." (28)

Chase. In a paper entitled, "Some Perspectives on the Alberta Human Resources Research Council", Chase suggested four types of research and development studies and a number of research projects for the consideration of the staff. (11) Figure 8 summarizes Chase's suggestions.

Decore. Decore's papers during this period were directed, primarily, towards the establishment of a program of evaluation and studies of data storage and retrieval. (14) With respect to evaluation studies, Decore wrote that there was a need for a rigorous examination of social development programs:

Searching questions must be asked. Is the program efficacious in ameliorating some problems? Does the program achieve the goals set for it? What are the unanticipated effects of the program? Could the same results be achieved with less expense in time and money? (13:1)

She suggested that a program of evaluation could include such projects as:

1. the development of mechanisms to define areas in need of research,
2. manpower projections for social service personnel, and
3. cost-benefit analyses of the allocation of resources. (13:2)





FIGURE 8

STUDIES FOR H.R.R.C.  
PROPOSED BY F. CHASE  
November, 1968

Type of Study	Suggested Projects
1. Base-line	<ol style="list-style-type: none"> <li>1. Study of existing research organizations in Alberta.</li> <li>2. A study of the state of the social sciences in Alberta.</li> <li>3. A study of the extent and causes of underdevelopment of Alberta's human resources.</li> <li>4. An analysis of the state of knowledge for identifying and correcting conditions which inhibit the full development of an individual.</li> </ol>
2. Evaluative	<ol style="list-style-type: none"> <li>1. A study of the planning processes used in the social sciences.</li> <li>2. Comparative studies of achievement with populations differing in socio-economic levels, cultural characteristics, etc.</li> <li>3. Evaluation of the extent to which various institutions are achieving their objectives.</li> </ol>
3. Experimental	<ol style="list-style-type: none"> <li>1. Experiments to test motivation and level of performance in post-employment versus pre-employment training.</li> <li>2. Experiments to reveal variations in the amount and complexity of information which individuals can assimilate and apply.</li> <li>3. Experiments to show what relationship exists between physiological changes and an individual's level of cognitive activity and motivation.</li> </ol>
4. Developmental Operations	<ol style="list-style-type: none"> <li>1. Develop a program for up-grading manpower.</li> <li>2. Develop individualized instructional systems.</li> <li>3. Develop systems which integrate work, study and leisure activities so as to contribute to the total development of an individual.</li> </ol>



Decore's paper on a program of evaluation apparently lead to the staff dividing the program into two programs. One program area was to have as its primary objectives, " . . . the development of evaluation theory and methodology. . . ." and the evaluation of projects undertaken directly by H.R.R.C. (13) The second program area to be concerned with evaluation was to focus on the evaluation of programs in the public domain.

Downey. Downey devoted some time to the program area which came to be known as Operations Studies. He wrote, "The purpose of operations studies is to inform the process of planning and decision-making in the research organization itself." (25:1) To achieve this purpose Downey suggested such research projects as the study of data storage and retrieval capabilities in Alberta and the design of a system for H.R.R.C., and a study of research organizations. (28)

Housego. On October 23, 1968, Housego notified the staff that, "I am now in the process of trying to 'make a case' for an equality of opportunity study in education." (32) On the next day, Housego brought his ideas before the staff where:

. . . Dr. Chase and Dr. Downey, especially, refused to allow me to confine the study to simply a study of educational opportunity. So, by pressure they brought to bear I was forced to expand the whole concept. (34)

By late-October Housego had expanded the study of educational opportunity to one that came to be known as "A Study of Social Opportunity in Alberta." (34)

McIntosh. McIntosh's major contribution to Phase 4 was the writing of a proposal for a study of the means by which individual



development could be fostered. The proposal, which came to be known as Program 400: Individuality, included such projects as assessing the applicability of individually prescribed instruction programs and computer assisted instruction programs in Alberta schools and studying the nature of individuality. (38)

A memorandum. On October 30, 1968, the staff summarized the research projects which were receiving consideration. On November 1, 1968, Downey submitted the list of projects to Reiersen. (20)

Figure 9 is a summary of the proposed research activities of H.R.R.C. as of November 1, 1968.

A letter. A letter written by Downey on November 12, 1968, suggests that the period devoted to the writing of proposals had come to an end by mid-November. On that date he submitted the staff's proposals to the members of Council for their perusal and consideration. (21)

A Rationale for a Comprehensive Research Program. Upon completion of the writing of proposals, Downey undertook to synthesize the ideas which had been discussed since the first meeting in September. By late November, 1968, he had developed "A Rationale for a Comprehensive Research Program," which he described as a " . . . conceptual map of the total research domain . . . . " (24:11) The map identified four forms of research activities in which H.R.R.C. might engage. Downey wrote that the four forms of research activities did not signify four activities which were independent of each other, "Indeed . . . specific research programs may include activities of





FIGURE 9  
H.R.R.C. PROPOSED RESEARCH ACTIVITIES  
NOVEMBER 1, 1968 (20)

Category of Research Activity

- I. Operations Research
  - 1. Data Collection and Storage Capabilities in Alberta
  - 2. Needed Research and Development
  - 3. Research and Planning Capabilities in Alberta
  - 4. Systems Development
  - 5. Base-Line Investigations
- II. Social Stock-Taking
  - 1. Equality of Opportunity
  - 2. Disadvantaged
  - 3. The City
  - 4. Rural Life
- III. Program Evaluation
  - 1. Welfare
  - 2. Youth
  - 3. Health
  - 4. Education
- IV. Research and Development
  - 1. Individualization
  - 2. Manpower
  - 3. Bilingualism
- V. Planning
  - 1. Forecasting
  - 2. Interpretation and Consultation



several or all forms." (6:3) Figure 10 illustrates Downey's map of the research domain.

### Phase 5

Phase 5 of the planning process appears to have been completed by the end of the first week in December. Housego had completed a preliminary design of a study of "Social Opportunity" by November 15, 1968. (34) On November 20, 1968, Downey wrote the Dean of the Faculty of Education, University of Calgary and stated; "The first phase of the Opportunity Study has now been planned, strategies have been established, and participants have been identified . . . ." (23:2) McIntosh's study of Individuality appears to have reached the preliminary design stage by November 26, 1968, for on that date he wrote to Dr. J. Fritz of the University of Calgary and enclosed a copy of a base-line study of Individuality. (37) In a report to Council, on January 6, 1969, Downey noted that several aspects of the Individuality study had been initiated in December. (27) In the same report Downey also noted that Decore's study of data storage and retrieval systems had been initiated in December. (27) Hudson stated that, "By and large our planning period had come to an end by the end of November." (35)

The completion of the final draft of the Prospectus on December 4, 1968, also suggests that a great deal of attention had been given to Phase 5 by early-December, for the Prospectus represented commitments to research projects that the staff was prepared to initiate. (6) Figure 11 summarizes the programs and projects to which the staff had become committed as of December 4, 1968.



FIGURE 10

A RATIONALE FOR A COMPREHENSIVE RESEARCH  
PROGRAM (26)

FORM I  
OPERATIONS STUDIES

I. Operations Studies

The purpose of these studies is to inform the planning activities of the research agency itself.

FORM II  
BASE-LINE STUDIES

II. Social Stock-Taking

The purpose of these studies is to obtain descriptions of existing conditions -- to suggest areas of needed research and development and to provide a base against which to assess progress.

III. Evaluative Studies

The purpose here is to evaluate various aspects of the social service program.

IV. Syntheses and Codifications

The purpose of these studies is to pull together available knowledge on a particular subject -- either to identify gaps in knowledge (needed research) or gaps between knowledge and practice (needed development work).

FORM III  
RESEARCH AND DEVELOPMENT

V. Fundamental Research

The purpose of these studies is to add to the store of knowledge on a particular issue.





## FIGURE 10 (Continued)

## FORM III

## RESEARCH AND DEVELOPMENT

## VI. Invention and Development

The purpose of these activities is to create inventions or products, based upon available knowledge.

## VII. Demonstration and Field Testing

The purpose here is to field test a variety of inventions or innovations under local conditions.

## FORM IV

## DISSEMINATION ACTIVITIES

## VIII. Dissemination

The purpose here is to communicate the results of research to other researchers and to policy-makers or practitioners.

## IX. Planning Activities

The purpose here is to provide specific information to planning agencies, to assist in the interpretation of the information, and to help weigh the probable consequences of alternative courses of action.



## FIGURE 11

## H.R.R.C. PROPOSED PROGRAMS AND PROJECTS

DECEMBER, 1968 (6)

## PROGRAM AREA 100: OPERATIONS STUDIES

- 101. A study of data storage and retrieval capabilities in Alberta and the design of a data system for H.R.R.C.
- 102. A study of research organizations, the correlates of productivity in such organizations, and the implications for the strategies of H.R.R.C.
- 103. Preliminary feasibility and codification studies in selected areas (the inner city, educational facilities, bilingualism).
- 104. Grants-in-aid of selected studies by scholars in appropriate fields.

## PROGRAM AREA 200: OPPORTUNITY

- 201. A base-line study of inequalities of opportunity in Alberta (political, economic, educational).
- 202. Second-stage empirical studies of opportunity in selected areas or as it applies to specific groups.

## PROGRAM AREA 300: EVALUATION

The development of mechanisms for cooperative evaluation of selected government-sponsored programs (Welfare, Youth) and other social service programs in Alberta.

## PROGRAM AREA 400: INDIVIDUALITY

- 401. A base-line study of emerging trends and theories in the individualization of instruction and the extent to which these have influenced Alberta schools.
- 402. A field testing and second generation development project in Individually Prescribed Instruction.
- 403. Theoretical and experimental studies of the nature of individuality.
- 404. Experimental and developmental activities in computer-assisted instruction.

## PROGRAM AREA 500: DEMONSTRATION AND FIELD TESTING

- 501. The Small High School Project.

## PROGRAM AREA 600: MANPOWER AND EDUCATIONAL PLANNING

The development of a mechanism whereby the results of planning-based studies may be reported directly to the policy-making agency. Examples:

- a. Routine population and manpower projections.
- b. A forecast of teacher supply and demand in Alberta.
- c. A study of the need, training, placement and utilization of community workers in Alberta.

## PROGRAM AREA 700: DISSEMINATION



#### IV. THE ORGANIZATIONAL STRUCTURE

##### A Review of Events: January - August, 1968

At the time Downey assumed the directorship he envisioned that H.R.R.C. would be:

. . . a very fluid kind of an organization; one that would never become highly institutionalized; one that could change direction easily; one that would do a modest amount of work with an in-house staff and certain other work through grants-in-aid and contracts. (28)

At the January Council meeting and in the "Strategy Papers" of January 22, 1968, Downey argued that H.R.R.C. should possess both an in-house and an out-of-house research capability. (15) He stated that while an in-house capability ensured control over research activities and facilitated, " . . . effective development work." an out-of-house research capability was necessary when the staff did not possess all the necessary talents, as well as enabling, " . . . us to stay small and to preserve fluidity and flexibility . . . . It is an antidote to institutionalization." (28)

The June meeting of Council moved, as policy, that H.R.R.C. be an organization oriented primarily towards intra-mural research with occasional support of extramural research. (2) While the policy did not challenge Downey's contention that there be both an in-house and an out-of-house research capability for H.R.R.C., it did suggest to him that a program of grants-in-aid would not receive the wholehearted approval of the Council. (28)

Thus at the end of August, 1968, the organizational structure of H.R.R.C. consisted of a Council and a director, with the director contending that H.R.R.C. should build a small in-house capability and





a somewhat larger out-of-house capability.

### The Formal Structure

Downey. From the first day that the staff gathered Downey worked at de-emphasizing the development of a formal organizational structure among the staff. He stated:

The director was just one of a group of planners and indeed I worked at making it so. I wanted it to be a deliberative body with no organizational structure, no hierarchy, no pecking order.

. . . I was hopeful that the early members of the staff would ultimately grow into the organization and become the leadership of the organization, when it ultimately developed. . . . (28)

The response of the staff to the question, "What organizational structure was there during the first few months of staff activity?" tended to support Downey's assertion that there was no formal structure during the first few months of operation.

Housego. Housego's reply to the question was:

A director and a group of colleagues. That was it, and with a very prestigious external consultant, Dr. Chase. But really the key figure was Dr. Downey, who was like the sun, in the center. Dr. Chase was like the moon, I suppose, in the sense that he was the next largest object in the universe. The rest of us floated around like meteorites or falling stars. (34)

Decore. Decore contended that there was no formal structure, rather, "It was a collegial process . . . ." (14) She noted, however, that she perceived Housego as being an Assistant Director. (14) She also stated that an organizational structure began to appear, "Gradually, starting at the beginning of December as we began to recruit." (14)



McIntosh. McIntosh agreed with Decore that no formal structure existed and that Housego was the Assistant Director. He also maintained that the lack of structure could be attributed to the nature of the task presented to the staff in September. He stated, "It was our task to take hold of this [the mandate] and create a program first, and then create an organization that would enable us to implement the program . . . ." (40)

Hudson. Hudson concurred with Decore and McIntosh when he maintained that Housego was the Assistant Director. He further stated:

By and large, decisions and discussions were taken by the total group, so we really didn't have a formal structure. Even in November things hadn't really shaken down . . . . The organizational structure didn't start to take form until after the Council meeting [January 16, 1969] . . . . (35)

Housego and Downey agreed that Housego was not the Assistant Director during the first few months of operation, for it was not until the January 16, 1969, Council meeting that Housego was appointed Deputy Director. Downey did state, however, that when he brought the staff together in September, "I saw in Ian Housego kind of an extension of myself . . . he was the one man who I thought could challenge me, yet complement me." (28)

Roles. The staff's description of the roles they played during the first few months of activity are also suggestive of a lack of a formal structure. All agreed that their primary role during the September, 1968 to January, 1969 period was one of planning and conceptualizing. Housego asserted that his, " . . . role of planner went on until about Christmas . . . ." (34) McIntosh noted that the role





of planner and conceptualizer, " . . . was my full-time activity until January." (40)

Policy development. In response to the question, "How were policies formulated during the September, 1968 to January, 1969 period?" the staff agreed that policies were developed by the entire staff and then submitted to the Council in January, 1969.

Downey stated that policies were formulated:

Through a very informal process of exchange of ideas among the staff and I mean really quite informal and this was deliberately so. We set a very relaxed and informal kind of atmosphere here last fall so that there was a good deal of free exchange, a good deal of open criticism of each other. We had a good dialogue going on. (28)

Downey went on to state that, "As various people developed fragments of policy, I tried to put them together . . . ." (28)

Housego stated that, "Policy so far has been largely bubbling up from within staff." (35) Decore, McIntosh, and Hudson confirmed the views of their colleagues. (14, 35, 40)

A Rationale for a Comprehensive Research Program. The lack of formal structure is also suggested in Downey's paper, "A Rationale for a Comprehensive Research Program." In the paper, which was completed by late November, 1968, Downey wrote:

It is important to note . . . that the rationale has few, if any organizational implications; it is merely a device for dividing the total research endeavour into its constituent parts -- for conceptual purposes. (26:3)

Position Papers. At the time that proposals were being written for research programs some attention was also being given by the staff as to the type of organization that H.R.R.C. could





become. To this end Chase and McIntosh and Hudson wrote two position papers outlining the organizational alternatives available to H.R.R.C.

Chase suggested that H.R.R.C. could adopt one or a combination of four organizational strategies. These were:

1. Stimulation and facilitation of research and development through grants and contracts.
2. Major reliance and stimulation of and assistance to research and development by other agencies, with supplementary staff-conducted research and development as required to fill gaps.
3. Major emphasis on in-house research and development with arrangements for collaboration with and support of complementary research and development by other agencies.
4. Concentration on in-house research and development, with close linkages to research communities and other sources of knowledge and to consumers of research and development products. (11:19-20)

McIntosh and Hudson argued that H.R.R.C. adopt a pluralistic organizational strategy. They wrote:

. . . we envision a research organization which is structured, in part, on the foundation model (inasmuch as it incorporates mechanisms for funding proposals submitted by independent scholars); in part, as a contracting agency (inasmuch as it looks beyond itself for the talent and expertise it requires); and, in part, an in-house R and D Center (inasmuch as it includes a built-in capability for the conduct of certain kinds of research and development). (39:21-22)

Grants-in-aid. Using their paper and Chase's as a base, McIntosh and Hudson wrote a proposal for the establishment of a grants-in-aid program. By late November the staff had accepted the idea of a grants-in-aid program. (40) In December the grants-in-aid program was incorporated into the Prospectus as Project 104. (6)



### The Informal Structure

Although there appears to have been little formal structuring of staff, the staff agreed that an informal structuring existed. Decore's comments were typical of those of the staff. She stated, "In many ways H.R.R.C. is being run by informal relations." (14)

The dominant individual in the informal organization appears to have been Downey. Housego identified Downey as the key figure. (34) McIntosh described Downey's support of a policy issue as crucial. (40)

Chase, during the two month period that he was with the Council, was perceived to have been the second most influential figure, however, as Decore pointed out, "In terms of tangible kinds of inputs his presence is not readily apparent, in terms of intangibles he was a very influential figure." (14) That is, Chase's contribution to the planning process tended to be one of advice-giving rather than designing specific projects.

McIntosh was also seen by the staff as a key individual. Decore contended that Downey and McIntosh, " . . . were about equal in terms of influence upon direction." (14) Housego and Hudson also perceived McIntosh as possessing great influence during the planning period. (34, 35)

The staff agreed that Housego was considerably more influential than Hudson, in terms of setting direction, and that both men were of greater influence than Decore. (14, 35, 40)

The staff member most often selected as being of least influence was Decore. Decore also perceived herself as being of least influence.



She stated:

I think without his [Chase] presence many of the things I said would have been thrown into the wind. Even at that I think my influence in shaping the course during the first few months was not terribly important. (14)

## V. FINANCING

### The Legislation

The legislation establishing H.R.R.C. directed that H.R.R.C. funds be appropriated by the Legislative Assembly of Alberta. In practice the procedure has been for the Legislature to include H.R.R.C. monies in the Executive Council Vote. The legislation empowers the Council of H.R.R.C. to employ personnel as required and to, " . . . prescribe their duties and their salaries or remuneration." (29)

The legislation also directed that, "The Provincial Auditor or his nominee shall from time to time and at least once a year audit the receipts and expenditures of the Council." (29) In practice, the Auditor conducts both a pre-audit and a post-audit of the receipts and expenditures of Government. This practice on the part of the Auditor is possible under the provisions of the Financial Administration Act. (30)

### The June Council Meeting: A Review

The June 10, 1968, meeting of Council confirmed the appointments and rates of remuneration for Decore, Housego, and McIntosh. The Council also agreed that the staff of H.R.R.C. was to be granted the equivalent of one month's salary which was to be applied to expenses incurred in relocating in Edmonton. (2)





### A Conflict

In mid-July, 1968, Downey submitted, to the Auditor, a claim for reimbursement of expenses incurred in moving to Edmonton. The Auditor rejected the claim on the grounds that H.R.R.C.'s legislation did not empower the Council to approve such expenditures. The Auditor also argued that Council Minutes did not constitute sufficient authority to approve the disbursement of funds. (28) In early September the claims of Housego and McIntosh for reimbursement of moving expenses were also rejected by the Auditor. (34, 40)

A meeting. In early September Downey met with Reiersen to discuss, " . . . the apparent conflict between the Act to establish H.R.R.C. and certain other Acts -- particularly the Financial Administration Act". (16) The discussion resulted in Reiersen requesting the Auditor to release the funds necessary to pay the removal expenses of the staff. However, Downey stated, "The Auditor . . . challenged my authority as director and Mr. Reiersen's authority as the Chairman [of the Council] so he simply refused to pay the bills." (28)

A second meeting. During September, the Auditor also refused to disburse funds which would compensate the staff for expenses incurred while travelling on H.R.R.C. business. Payment was also refused for library requisitions submitted by the staff. In late September Downey asked the Premier to intercede in the dispute. (28) On September 25, 1968, Downey met with representatives of the Auditor's office, the Provincial Treasurer's office, and the Executive Council office. The meeting concluded with an agreement that the Minutes of the meetings



of the Council of H.R.R.C. constituted sufficient authority for the Auditor to release funds. The meeting also agreed that the Council of H.R.R.C. should establish by-laws which would authorize the Auditor to disburse funds when expense claims were submitted. (28)

A letter. On September 27, G. Acorn, Assistant Legislative Counsel, Government of Alberta, wrote the Auditor and suggested means by which H.R.R.C.'s financial problems could be ameliorated. Acorn suggested that steps be taken to secure an amendment to H.R.R.C.'s legislation so as to remove the anomalies:

. . . arising from the fact that while the Legislature gave the Council broad powers . . . without the necessity for Government approval of its actions, the Legislature nevertheless provided its funds by way of Appropriation 1460 under the Executive Council Vote . . . . Thus the independence that the Council appears to have on the face of its Act is restricted to the extent that it has no money that it can spend on its own motion. (1)

Acorn also suggested that the Auditor accept the "Minutes" of the June 10, 1968, meeting of Council as, " . . . relevant evidence . . ." in paying the expenses of H.R.R.C. staff. (1) He noted, in support of this suggestion, "It must be kept in mind that two Cabinet ministers are members of this Council and presumably participate in these decisions." (1)

Chase. Despite the agreement reached at the meeting of September 25, 1968, and the legal opinion offered by Acorn, many H.R.R.C. accounts continued to be rejected by the Auditor. Throughout September and October, Downey submitted claims for the payment of Chase's consultancy fees. The Auditor refused payment on the grounds that the Council had not formally approved Chase's appointment. When



Chase completed his two month obligation to H.R.R.C. on November 1, 1968, he left Edmonton without having received payment for his services. (28)

By-laws. On November 1, 1968 Downey wrote Reiersen and suggested that many of H.R.R.C.'s difficulties with the Auditor could be resolved by establishing by-laws. (20) On November 8, 1968, Hudson met with Mr. A. Anderson, Senior Auditor for Disbursements, Provincial Auditor's Office. The purpose of the meeting was to: (1) determine why Chase's salary and the removal and travel expenses of staff had not been paid, and (2) explore possible means by which the accounts could be paid. (34) Hudson came away from the meeting convinced that payments were not being held back, " . . . out of any malicious spite." and that there was a need for staff to establish procedures for handling H.R.R.C.'s finances without seeking Council approval for every item of expenditure. (35)

On November 17, 1968, in a memorandum to Council, Downey informed the councillors that a set of by-laws had been drafted for their consideration. (22) In addition, Downey suggested that Council might undertake preliminary discussions with the Government with a view to obtaining an amendment to the legislation. (22)

The by-laws, which were later approved by the Council, empowered the director to authorize payment of accounts in the absence of Council approval of specific expenditures, provided the expenditures were included in the Council-approved budget. (7)

In sum, the financial difficulties encountered by H.R.R.C. developed from differing interpretations of H.R.R.C.'s legislation





and the lack of by-laws which would authorize expenditures not specified in the legislation. By mid-November, 1968, the staff had drafted a set of by-laws and were suggesting that H.R.R.C.'s legislation was in need of an amendment.

## VI. RELATIONSHIPS WITH EXTERNAL AGENCIES

### Review of Events: January - August, 1968

From the time of the January meeting of Council until the first meeting of staff in early September, Downey was being made aware of the expectations that were being held for H.R.R.C. by a number of Alberta agencies. (28) In his "Strategy Papers" Downey acknowledged that the support of outside groups was needed but that commitments should not be made until the staff was able to create a plan of action. (15)

In June, 1968, Downey outlined his concept of the posture that H.R.R.C. should adopt towards the Government, H.R.D.A., and the Alberta Advisory Council. The Council of H.R.R.C. accepted Downey's concept at the June 10, 1968 meeting. The Council did not, however, suggest or recommend postures which might be established towards other agencies. (2)

### Relationships With Governmental Agencies

The Cabinet. The staff agreed that they were aware of little direct pressure or influence by the Cabinet on H.R.R.C. operations. Downey contended that his meetings with Cabinet had been very good. He also maintained that the Cabinet had not brought pressure to bear



on the selection of research programs. He stated that when he presented the Cabinet with the Prospectus, "The Cabinet established a priority system. We accepted this as the reactions of just another group. In some cases their priorities were observed and in some cases they were not." (28) Downey remarked, however, that H.R.R.C. did acquiesce to a Cabinet request that the studies of urban conditions " . . . not move too quickly." (28) With reference to the request Downey stated, "In a way that is influence but it's a perfectly reasonable kind of influence and we accepted it as such." (28) McIntosh stated that H.R.R.C. has not been subjected to, " . . . undue government pressure." (40) Decore maintained that she was not aware of direct pressure. (14)

The staff did agree, however, that Reiersen, during his tenure as Chairman of H.R.R.C., brought indirect pressure to bear on H.R.R.C. activities. The pressure exerted by Reiersen was one of not calling meetings of the Council. The meeting scheduled for late October, 1968, was postponed to mid-November then to December 16, 1968. The December meeting was also postponed until January 16, 1969. The staff felt that the series of postponements resulted from Reiersen wanting to reduce the deliberative nature of Council so that H.R.R.C. could be incorporated into a Department of Government. (28, 34, 35, 40)

Departments of Government. As part of the staff activity in Phase 2 of the planning process the staff entered into a series of discussions with a number of Government Departments. Housego stated that while many ideas were received, "The two Departments that sought us out were Education and Public Welfare. All the others have gone



on as if we didn't exist." (34) Despite this apparent interest in H.R.R.C. by Education and Public Welfare, McIntosh asserted that, "No formal relationships exist . . . ." (40) Decore claimed that she had made contact with a few individuals in the Department of Education in order to obtain information for her study of data storage and retrieval systems in Alberta. (14)

The staff agreed that meetings with Government Departments have been infrequent. Furthermore, although advisory committees, which included departmental personnel, have been created by the staff these have been ad hoc rather than standing committees. (14, 28, 34, 35, 40)

H.R.D.A. Although the staff initiated discussions with a number of H.R.D.A. personnel during Phase 2 of the planning process, Downey claimed that, " . . . nothing much has come of it [the discussions]." (28) McIntosh noted that meetings between H.R.R.C. staff and the staff of the research branch of H.R.D.A. had been held as to the possibility of conducting the rural high schools project in an area where H.R.D.A. was working, but, " . . . this did not come to be . . . ." (40) McIntosh characterized the relationship between H.R.R.C. and H.R.D.A. as "tenuous" and "inchoate". (40) Housego asserted that, "We've had very little to do with them." (34) Downey stated that the relationships were, "Only informal relationships." (28) Mr. J. Oberholtzer, Director of H.R.D.A. substantiated the views of the staff of H.R.R.C. (41)





Alberta Advisory Council. Commenting on the relationships between H.R.R.C. and the Alberta Advisory Council, Downey maintained that they were informal and the contacts infrequent. (28) Housego stated, "We've had nothing to do with them." (34) McIntosh asserted, "I'm not fully aware what the Advisory Council does . . . . As far as I know our relationships with the Advisory Council are really nil . . . ."

(40) Mr. R. MacKinnon, Chairman of the Alberta Advisory Council concurred with the views of the staff members of H.R.R.C. that the relationship between the two organizations were informal and the contacts were infrequent. (36)

The comments of H.R.R.C. staff and the chairmen of H.R.D.A. and the Alberta Advisory Council indicate that the relationships between H.R.R.C. and H.R.D.A. and the Alberta Advisory Council have not been formalized. Furthermore, neither H.R.D.A. or the Alberta Advisory Council appear to have had much influence in determining the research priorities of H.R.R.C.

#### Relationships With Non-Governmental Agencies

The staff agreed that they had initiated discussions with a number of non-governmental agencies. Such agencies as the A.T.A., the A.S.T.A., and the universities were contacted by the staff. The staff noted that the discussions sought to obtain ideas and to clarify the role of H.R.R.C., but that no attempt was made to establish formal relationships. (14, 28, 34, 35, 40)

The staff noted, however, that a deliberate effort was made to obtain the support of Alberta educators. Downey asserted, "We ran into the most skepticism and doubt and, in some cases, a little



bit of animosity in the faculties of Education, particularly the Faculty of Education in Edmonton." (28)

Downey contended that he envisioned H.R.R.C. as supplementing the educational research capability of Alberta, thus, "It was just imperative that we establish linkages with this group." (28) The linkages that were established were of two types. First, the staff invited the educators to sit on two ad hoc advisory committees -- the Ad Hoc Advisory Panel on Research and Development in Education and the Ad Hoc Advisory Panel on Educational Planning. Second, Downey and McIntosh maintained that the grants-in-aid project developed partially in response to the discussions with the educators. (28, 40)

In sum, the relationships of H.R.R.C. with non-governmental agencies appear to parallel H.R.R.C.'s relationships with governmental agencies -- that is, the relationships are of an informal nature.

Commenting on the lack of formal relationships with external agencies Downey stated:

We wanted all kinds of input, we wanted ideas, we wanted to pick as many brains as we possibly could, but we didn't want to incur any debts to anybody. We made it abundantly clear that all committees were ad hoc, that all meetings were ad hoc and that we were engaged in the business of building a bank of ideas, not making commitments to clients. (28)

Housego argued that the lack of formal relationships during the planning period was deliberate because, "By being as informal as possible we leave many options open with respect to what we do." (34) McIntosh asserted that the lack of formal relationships with external agencies developed from, "A desire to get our own feet on the ground before we became the captive of groups to whom we might make premature commitments." (40)





## VII. THE THIRD MEETING OF COUNCIL

On January 16, 1969, after a series of postponed meetings, the Council met to consider the proposals which had been brought forward by the staff. Of the nine councillors in attendance, Mr. R. Clark, Minister of Education, and Mr. N. Leatherdale, Past President of the A.S.T.A. were new appointees. Clark also assumed the position of Chairman of H.R.R.C. (43, 44)

### Objectives

Except for two projects which were held for review, the Council approved the program of research which the staff had proposed in the Prospectus. Council approved the expenditure of \$191,440 by March 31, 1969, in order to operationalize the programs. Of this sum \$75,000 was allotted to the grants-in-aid project. (8)

### Organizational Structure

Council approved the by-laws which had been submitted to it by the staff. The by-laws called for the creation of an Executive Advisory Committee and a Salary Advisory Committee. The Executive Advisory Committee was to consist of three councillors who were to, ". . . consult with, and advise the director, on any matter he may wish to refer to it." (7) The Salary Advisory Committee, consisting of two councillors, two members of staff, and two persons chosen by the other four, was to, ". . . review the salary schedule annually and make recommendations to Council." (7)

The by-laws also created the positions of Vice-Chairman and Secretary of Council. Councillor Aalborg was designated as Vice-





Chairman and Housego as Secretary. (8)

Council also approved the appointment of Housego to the position of Deputy Director. Approval was also given to the appointments of Mr. J. Hudson and Mr. R. Drysdale to the position of Associate Research Officer and to the appointment of Dr. E. Ingram as Program Coordinator for Program 500. (8)

### Financing

Council approved a by-law which empowered the director, ". . . to authorize payment for facilities and equipment, to authorize payment of consultant fees and other expenditures within the budget." (7) A by-law was also approved which stated:

Cheque signing authority for the disbursement of Council funds shall be given jointly to the Chairman or Vice-Chairman of Council and the Director or Secretary of Council. (7)

Council also directed Clark, Aalborg, and Downey to meet with the Auditor, " . . . to clarify the Auditor's requirements by which the transfer of funds to Council may be expedited." (8)

The Council also dealt with the proposed budget for the 1969-1970 fiscal year. The staff had submitted a budget figure of \$976,385. Aalborg asked Council to reduce the figure by approximately one-half. After considerable debate Council moved that a budget of \$976,385 be submitted to the Government. Council also moved, "That the staff re-examine the proposed programs, establish priorities and be prepared to revise the estimates if need be." (8)

### VIII. SUMMARY

On September 3, 1968, the staff of H.R.R.C. gathered and began



planning a program of research. The first major focus of staff activity in the planning period was the establishment of objectives. By mid-September the staff had devised objectives which suggested three foci for H.R.R.C. -- research, development, and the informing of social policy.

In mid-September the staff entered into a dialogue with a number of Alberta agencies. The purposes of these discussions were two-fold. First, the staff would be made aware of the expectations being held for H.R.R.C. Second, the staff could clarify H.R.R.C.'s role in Alberta research. Throughout these discussions the staff deliberately refrained from establishing formal relationships with agencies external to H.R.R.C.

In September, the staff also encountered a number of difficulties in obtaining finances from the Auditor. The Auditor, despite the intervention of various Cabinet ministers and the Assistant Legislative Counsel, rejected payment of a number of accounts. He argued that many expenditures had been made which either were not within the power of Council to authorize or had not been authorized by Council. In partial response to the difficulties the staff wrote a set of by-laws for H.R.R.C. Although the by-laws were approved at the January 16, 1969, meeting of Council, they did not fully resolve all the difficulties with the Auditor.

In late October the staff began to give some attention to the development of criteria that would guide the selection of research projects. The criteria that were developed indicated that the staff would choose projects which would: (1) have both long and short-



term pay-off; (2) reflect the interests of staff; (3) generate new areas of inquiry; (4) complement existing research activities, particularly in education; and (5) inform and be critical of but not hostile toward policy-makers.

By mid-November the staff had completed the writing of a number of research proposals which were subsumed within seven broad Program Areas and incorporated into the Prospectus in early December, 1968.

Throughout the planning period the staff perceived little formal structure among themselves but did concede that an informal structure was present. Downey was perceived as being the dominant individual among the group while Decore was perceived as being least influential.

On January 16, 1969, the staff presented their plans to Council which, to a great extent, ratified them without modification.





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## CHAPTER VI

### SUMMARY, PROPOSITIONS, AND RECOMMENDATIONS

#### FOR FURTHER STUDY

##### I. INTRODUCTION

This study was an investigation of the genesis and early growth of the Alberta Human Resources Research Council. Specifically, the study attempted to describe the events leading to the: (1) conception of the idea of H.R.R.C.; (2) legislative enactment of H.R.R.C.; (3) development of H.R.R.C.'s initial policies; and (4) modification of the initial policies. In conclusion, the major findings of the study will be discussed, propositions will be set forth, and recommendations for further study will be offered.

##### II. MAJOR FINDINGS

###### The Idea

The idea for H.R.R.C. grew out of the activities of two major Alberta groups -- education-interest groups and the Government.

During the years 1953 to 1966, the education-interest groups conducted a campaign which sought Government financial support of educational research. By December, 1965, the educators were convinced that the Government was prepared to give legislative approval to the proposal for establishing the Alberta Educational Studies and Development Council. In February, 1966, the Government announced that legislative sanction of A.E.S.D.C. would not be forthcoming. In March, 1966, a number of M.L.A.'s indicated that the Government was



examining the feasibility of establishing a human resources research agency.

The Government's expression of interest in a human resources research agency grew out of a shift in policy emphasis in the early 1960's. The shift in emphasis resulted in the implementation of a number of Government programs designed to develop Alberta's human resources. In December, 1965, Erick Schmidt was appointed to coordinate the programs. In 1966, Premier Manning, his son Preston, and Schmidt began writing a White Paper which outlined a comprehensive approach to the development of human resources. H.R.R.C. was seen, by the three men, as facilitating the development of human resources by enhancing the Government's social data analysis capability.

#### Political Action

In November, 1966, T.C. Byrne and Schmidt, using the educators' proposal for establishing A.E.S.D.C. as a model, began writing H.R.R.C.'s legislation. A campaign by Alberta educators to place educational research in a central position in H.R.R.C. activity was partially successful. The legislators exhibited little opposition to H.R.R.C. but indicated that educational research should be prominent among the research activities of H.R.R.C. On March 30, 1967, the Legislature gave its approval to the enactment of H.R.R.C. The legislation directed that H.R.R.C.: (1) have a ten-member legislative body called a Council; (2) finances be appropriated by the Legislative Assembly; and (3) undertake research which would aid in the development and conservation of Alberta's human resources.



### Initial Policy Development

Legislative approval of H.R.R.C. was not followed by its immediate operationalization. Factors contributing to the nine month delay included the Premier's advocacy of a deliberate approach to operationalization; a provincial election; resistance to H.R.R.C. on the part of some Cabinet members; a delay in making appointments to the Council; and the search for a director.

During the period January to August, 1968, decisions which had implications for H.R.R.C. policy were made by the Council and the director. These decisions indicated that: (1) the staff was to devise a program of research; (2) H.R.R.C. was to be responsive to the research needs of Government; (3) H.R.R.C. was to be primarily an in-house research agency; and (4) the role of H.R.R.C. was to inform social policy. Council also adopted a salary schedule for staff and a system of financial reimbursement for expenses incurred by staff while moving to Edmonton and while travelling on H.R.R.C. business.

### Policy Modification

During the period September, 1968, to January, 1969, decisions which had implications for H.R.R.C. policy were made by the director and the staff and then submitted to Council for ratification.

During this period the staff developed a program of research consisting of seven Program Areas. The staff, in partial response to difficulties encountered with the Auditor, wrote by-laws which gave the director greater control over the administration of H.R.R.C.'s finances. The staff also developed a grants-in-aid project which





would allow H.R.R.C. to offer financial support to independent researchers. Contact was established with a number of external agencies but the aim of staff was that these be of an ad hoc nature. Throughout the planning period little emphasis was placed by the staff on a formal structure, but the director remained the arbiter of staff decisions. On January 16, 1969, the Council met and approved, without major modification, the proposals brought forward by the staff.

### III. PROPOSITIONS

On the basis of the major findings of this study a number of propositions can be put forth with regard to the genesis and early growth of an organization sponsored by the Government of Alberta. These propositions, as they are based on findings pertaining to a study of a single organization sponsored by the Government of Alberta, must be considered as being of a preliminary nature and in need of further testing.

For the purpose of the following discussion the term Government refers to the Government of the Province of Alberta.

- I. As congruency increases between goals and needs, then the probability of support increases.
  - A. If an organization is to receive the support of Government, then Government must perceive the organization as meeting needs of Government.
    1. If the Government perceives the organization as meeting needs of Government, then the organization will receive the support of Government.



2. If the Government does not perceive the organization as meeting needs of Government, then the organization will seek to persuade the Government that it does meet needs of Government.
  - a. If the organization seeks to persuade the Government that it meets needs of Government, then the organization must gain the support of key influentials in Government.
  - b. If the organization seeks to persuade the Government that it meets needs of Government, then the organization must gain the support of relevant others.
- B. If a Government-sponsored organization incorporates a number of ideas inherent in an organization not receiving the support of Government, then the Government will tend to seek means of overcoming resistance to the organization it has sponsored.
  1. If the Government seeks to overcome resistance to the organization it has sponsored, then it will meet some of the requests made by the proponents of the organization which did not receive the support of Government.
  2. If the Government seeks to overcome resistance to the organization it has sponsored, then it will tend to utilize some of the proponents of the organization which did not receive the support of Government in the governing of the Government-sponsored organization.
- II. As an organization grows it will tend to seek an explication of the expectations held for it.
  - A. As a Government-sponsored organization explicates the expec-



tations held for it by the Government, the organization will tend to seek strategies which might be utilized in fulfilling those expectations.

- B. As a Government-sponsored organization explicates the expectations held for it by agencies external to the Government, the organization will tend to seek strategies which might be utilized in fulfilling those expectations.

III. As an organization grows, it will tend to seek greater autonomy.

- A. As a Government-sponsored organization grows, it will tend to perceive difficulty in defining its relationship with Government.
- B. As a Government-sponsored organization grows, it will tend to establish ad hoc relationships with agencies external to itself.
- C. As a Government-sponsored organization grows, the professional staff will tend to perceive the Government as threatening the organization's prerogatives.
- D. As a Government-sponsored organization grows, the organization's governing body will tend not to perceive the Government as threatening the organization's prerogatives.

IV. As organizations seek to establish themselves, professional staff tend to be selected from a list of acquaintances who will be loyal and committed to the leaders.

- A. If the Government-sponsored organization seeks to employ professional personnel, then, during its early growth, it will tend to employ professional personnel who are known to





one another.

1. If the Government-sponsored organization employs professional personnel who are known to one another, then, during its early growth, the organization will tend not to emphasize a division of labor among its professional personnel.

2. If the Government-sponsored organization employs professional personnel who are known to one another, then, during its early growth, the organization will tend not to emphasize rules among its professional personnel.

B. If a Government-sponsored organization employs some professional personnel who are not known to one another, then, such personnel will tend to be selected from other spheres of influence.

V. As the frequency of meetings of the governing body of an organization decreases, the tendency of the professional personnel to assume a policy development function increases.

A. If the professional personnel assume a policy development function, then the governing body will tend to ratify the policies which the professional personnel have developed.

B. If the professional personnel assume a policy development function, then the governing body will tend to legitimate the policies which the professional personnel have developed.



#### IV. RECOMMENDATIONS FOR FURTHER STUDY

This study is by no means exhaustive and leaves many unanswered questions. Some of the problems for further study follow.

1. The student of organizations might test the propositions set forth in the preceding pages of this chapter. The propositions might be tested against Government-sponsored organizations and non-Government-sponsored organizations. Such a testing would contribute in great measure to an understanding of organizational genesis and growth.
2. Despite the support of most education-interest organizations, a number of Government-appointed study groups, and the Minister of Education, the Government rejected requests for the establishment of a publicly supported educational research agency. Thus, studies of the determinants of Government decisions, as they apply to education, appear to be warranted. Studies might also be initiated which would examine the roles played by M.L.A.'s, Cabinet members, and education-interest organizations in educational decision-making.
3. This study should be carried forward in order to obtain a more complete documentation of organizational growth. Attention might be focused on questions related to H.R.R.C.'s fiscal independence, modification of the roles occupied by the staff, the increasing activity of the staff in policy development, modification of the objectives, the internal communication patterns, and the resolution of H.R.R.C.'s relationships to governmental and non-governmental agencies.



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